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BA, MA, MEd

**The Possible Impact of the
Organisation on the Effectiveness**

of Workplace Learning

Doctorate in Education

The Open University

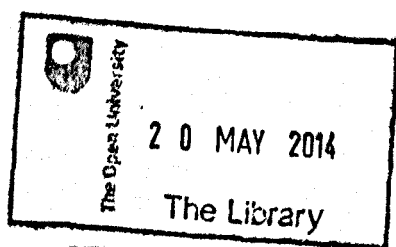
January 2013

Abstract

This thesis explores how dimensions of workplace learning are influenced by organisational practices and the features of organisations where workplace learning is perceived to be effective. Its particular focus is higher education workplace learning programmes that are tailored to meet organisational needs.

The thesis considers the literature that surrounds workplace learning and notes the breadth of definitions relating to it, including learning which is work related, learning which takes place within work or learning where the curriculum is devised around work. Key authors included in the conceptual framework are Billett (2000, 2001, 2004, 2006a, 2006b, 2008) in relation to affordances, Fuller and Unwin (2003, 2004, 2006) in relation to the expansiveness and restrictiveness of the organisation with regard to workplace learning and Eraut (2004, 2007) in relation to informal learning in the workplace. Literature examining the relationship between organisational and individual learning is also considered.

The research is qualitative in nature, a social constructionist approach having a predominant influence. Two case studies are used in the research project: a multinational logistics company and a regional public sector emergency service. Managers who were undertaking higher education workplace learning programmes and representatives within their employing organisations who



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commissioned workplace learning programmes participated in semi-structured interviews.

The findings of the research indicated that there are two major factors which impact on manager participants' perceptions of effective workplace learning:

- 1 Their experiences of workplace learning are closely linked to their perceptions of the time, autonomy and support they are afforded (or not) in order to engage in workplace learning activities.
- 2 For this particular group, effectiveness is also related to the level of synergy they feel exists between the workplace learning programme, the organisation and themselves.

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1 Introduction

1.1 Introduction

The intention of the research project detailed in this thesis was to explore the context and effectiveness of higher education workplace learning. The research focused on how employees either involved in or undertaking workplace learning programmes within two organisations described effective workplace learning. It also considered their perceptions regarding organisational factors which might influence the implementation, integration and impact of workplace learning programmes.

This first chapter will introduce the research discussed in this thesis. It will explain the background to the research and offer a brief introduction to both the context of workplace learning and current policy perspectives. Workplace learning in the higher education context will also be considered. The focus of the research will then be explored and this will be followed by an introduction to the case studies and the research participants. The chapter will conclude with a brief outline of the individual chapters within the thesis.

1.2 The background to the research

My interest in workplace learning emerged over a number of years, initially from designing and delivering learning programmes in a variety of workplaces and

latterly from delivering higher education workplace learning programmes. I was intrigued as to why the impact and outcomes achieved of similar learning programmes, delivered in a similar way were different depending on the setting within which they were delivered.

An initial study was undertaken to sample employers' views of workplace learning, its context and definitions. This indicated that a range of understandings and approaches to workplace learning were in use. I wanted to focus on a particular aspect of this range, namely workplace learning provided by higher education institutions. The main research project involved organisations whose employees were undertaking a higher education workplace learning programme delivered by an education provider that is a wholly owned subsidiary of a university. My relationship with the education provider is that I currently undertake consultancy work on their behalf and used to be employed by them on a permanent basis. However, I had not met any of the research participants in the main study prior to the research commencing and had not been involved in delivering their workplace learning programme.

1.3 The context of workplace learning

Learning at work has a variety of different facets with a wide range of purposes, levels, interest groups and delivery methods. Employers, employees, providers and policymakers may have different perspectives on these facets and this section will provide a brief overview of the importance of learning in the

workplace for occupational formation and policy perspectives on workplace learning. These issues will also be considered further in the literature review.

Learning in the workplace can encompass many different types of learning at work. With regard to one definition, Lester and Costly (2009, p. 2) suggest that:

The term 'work-based learning' logically refers to all and any learning that is situated in the workplace or arises directly out of workplace concerns. ... It includes learning that takes place at work as a normal part of development and problem-solving, in response to specific work issues, as a result of workplace training or coaching, or to further work-related aspirations and interests.

The literature review will explore further definitions of learning at work.

Although there is a long history of workplace learning in the UK, opportunities to engage in learning at work have been utilised more in some occupational sectors than others, for example nursing, engineering, and the building trades. In higher education programmes, placements have been utilised as part of an academic programme of learning, often leading to accreditation as a professional worker. However, for accredited post-qualifying study less workplace learning is employed. There may also be differences within sectors whereby some roles require workers to undertake training in the workplace via apprenticeship and NVQ programmes, whereas others are more likely to favour academic

programmes. The location of the learning offered may differ, with some learning being seen as work-related rather than work-based and delivered away from the workplace. This was noted in the 2006 Higher Education Academy (HEA) report into work-based learning which suggested that 'Work-based learning in health tends to be at NVQ level, and competence-based...there is a drift towards "work-related" foundation degrees, based in HEIs' (p. 17).

Participants from the initial study defined workplace learning as 'sitting next to Nellie' and, learning from watching more experienced colleagues, they also noted how it can be unplanned, occurring through interaction with colleagues. It might include elements of coaching, mentoring and reflective practice. Planned workplace learning programmes might include one-day workshops or action learning sets as well as programmes of learning leading to vocational and/or academic qualifications, for example foundation degrees, NVQs, and this variety of definitions will be explored further in the literature review.

Access to workplace learning opportunities, either informal or planned, can depend on the type of work undertaken. For example, being on duty with limited time to engage in learning activities or alternatively being able to manage one's own time at work can provide more or fewer opportunities to workers and therefore impact on engagement and related perceptions of effectiveness.

1.4 Current policy perspectives

Workplace learning has been given greater prominence over recent years due to the emerging recognition of the intrinsic link between learning and work and the importance of this in improving the predicted skills deficit over the next decade. These were highlighted in *The Leitch Review of Skills*, hereafter referred to as the Leitch Report (Leitch, 2006), which predicted that the average age of the workforce will increase as people work for longer. This means that new knowledge and skills are less likely to be entering the workforce, thus precipitating a need to increase the opportunities for older workers to build on existing knowledge and gain new skills. The Report also suggested that there will be a decline in those considered to be of prime working age, that is, people aged between 25 and 49. However, it goes on to say that this group are seen as less likely to participate in training than younger workers, which can further inhibit new skills and knowledge being brought into the workplace (Leitch, 2006).

The *Ambition 2020: World Class Skills and Jobs for the UK* report also found 'skills gaps' in the workforce (UKCES, 2009). The report notes that these were predominantly at level 4 for paraprofessional groups, stating that:

it is Associate professional, Skilled trades and Professional occupations where the largest volumes of skill shortage vacancies are reported. As a proportion of employment, the 'density' of skill shortage vacancies ... is far

higher for Associate professionals and Skill trade occupations (14 per 1,000 staff) than is the average for all vacancies.

(UKCES, 2009, p. 106)

In *The National Strategic Skills Audit for England 2010* UKCES noted that this perceived skills gap and the underlying factors which led to this deficit appear to affect some sectors more than others: 'Distinct sectors experience a specific combination of drivers of demand, with particular consequences for businesses, jobs, and in turn skills' (UKCES, 2010a, p. 38). Sectors which are identified as having higher skills shortages include health and social care, the computer and software sector, manufacturing (including oil, gas and electricity), pharmaceuticals and engineering. The *Audit* also indicated that skills shortages are experienced differently within different parts of England, noting that there are 'considerable variations across the regions in the pattern of skills demand and nature of skills imbalances. Such regional distinctiveness also needs to be recognised in terms of shaping action' (UKCES, 2010a, p. 38).

It is worth noting that these perceived skills deficits are often seen by policymakers as being partly an individual problem rather than a national issue relating to opportunities to develop new skills in the workforce. This is echoed in *A Theoretical Review of Skill Shortages and Skill Needs, Evidence Report 20* which stated that 'the existence of skill shortages can be explained partly in terms of factor substitution: that is to say, the unwillingness or inability of individuals and employers to consider switches between different occupations –

and also different locations and industries' (UKCES, 2010b, p. 4). This implies that the potential skills shortage might partly be due to individuals' reluctance to move to different areas in order to gain work which is matched to their particular skills and potentially that they may choose work less aligned to their skills in order to remain in their current geographical location.

Therefore, workplace learning is seen as being linked to promoting a more successful national and global economy for the UK and within this individual employees and employers are seen as having a major role to play.

1.5 Workplace learning and higher education

With regard to workplace learning and higher education, a number of factors have impacted on the desire for higher education institutions (HEIs) to become more involved. As well as highlighting potential skills deficits within the workforce, Leitch (2006) also suggested that HEIs needed to consider the provision of higher education for people already in the workplace but noted that relatively few HEIs had experience within this area. The 2006 HEA report into work-based learning also noted that:

Education policy has for the past few years emphasised widening access and participation as part of a drive for lifelong learning at all levels ... Engaging in workforce development is therefore seen as one means by which HE can work towards the 50% participation target and encourage non-traditional

students to access higher education, while helping to address demand for higher level skills.

(HEA, 2006, p. 10)

Although Leitch (2006) recommended that universities consider providing higher education to people in the workplace, few universities had extensive experience of this (Tallantyre, 2010a, p. 2).

There was also a lack of experience in providing flexible, employer-responsive higher education workplace learning provision (Tallantyre, 2010b). Tallantyre notes the concerns from some critics regarding the potential quality of such provision, and whether QAA (Quality Assurance Agency) quality frameworks were appropriate. With regard to this she suggests that 'such elements [of workplace learning] appeared to present a greater risk to quality and standards ... *as the latter were* defined in protocols conceived of in the context of more traditional provision' (Tallantyre, 2010a, p. 2). There was therefore an identified need to establish how workplace learning could be undertaken by HEAs while ensuring QAA standards were upheld.

With this aim in mind in 2007 HEFCE (Higher Education Funding Council for England) and QAA established a task force and following an extensive review of practice produced a report. Further collaboration followed which resulted in nine key areas for investigation being identified. Known as the 'Demonstrator Projects', the nine areas can be grouped into two broad categories:

1 Design of workplace learning programmes

- Rapid response and fit-for-purpose solutions for employer-responsive provision.
- Assessment of employer-responsive provision.
- Accreditation of company-based learning.
- Designing, accrediting and assuring bitesize provision.
- Accreditation of Prior Experiential Learning (APEL).
- Determining credit volumes for negotiated learning.

2 Support for workplace learning and working in partnership

- Supporting academic staff who contribute to employer-responsive provision.
- Managing employer and cross- institutional partnerships.
- Supporting workplace staff who contribute to the mentoring process within work-based academic awards.

Each of the associated research or 'Demonstrator Projects' were designed to take 'snapshots' of practitioner thinking and subsequently those involved produced detailed reports of their findings. While some of the reports relate to issues outside the scope of this research, two of the reports are of particular relevance: 'Managing employer and cross-institutional partnerships' (Lange and Dawson, 2010) and 'Supporting employer-based staff who contribute to academic awards through design, delivery and assessment' (Fielding, 2010). These reports will be explored in more detail in the literature review.

Tallantyre (2010b) suggests that engaging employers in higher education workplace learning requires a large degree of flexibility from HEIs. Areas that would need to be considered include flexible programme content which is negotiated with employers and employees and includes distance learning. Additionally, Tallantyre suggests that learning should usually take place in the workplace and be delivered at times to suit learners. It was also suggested that the assessment attached to higher education credit bearing learning should be relevant to learners' work activities (Tallantyre, 2010b). However, this has the potential to create tension between meeting the needs of individual learners, organisational expectations and meeting the academic quality assurance requirements of HEIs.

Brennan and Little acknowledge the relevance of workplace learning to the major functions of higher education. They note that 'at the institutional level, there is a strong argument for adopting a holistic view of the relationship of workplace learning to the full range of the institution's activities' (Brennan and Little, 2006, p. 15). However, from a higher education perspective, workplace learning can present many challenges to established university protocols, as noted by QAA: 'There are many positive aspects to the growth of this activity, but it is recognised that it can be considered as more complex and potentially present different challenges compared to more traditional provision' (2010, p. 1).

One of the reasons for this might be the potentially complex tripartite relationship between the HEI workplace learning provider, the learner and the employer.

From my own experience of workplace learning it appears that it is essential to balance the needs of each party in order to ensure workplace learning activities meet the requirements of 'academic rigour', the desired outcomes for participating organisations and the individual needs of learners. This may be complex as each party may have different agendas: the learner may want increased job security and to gain a qualification; the organisation is likely to require improved performance and productivity as an outcome of the workplace learning programme; and the HEI will want to ensure completion to potentially meet funding targets. As Reeve and Gallacher point out, differences in priorities and culture which exist between employers and HEIs often 'impinge on attempts to implement WBL programmes ... partnership of the fully integrated kind that is sometimes described in the literature, will be difficult to achieve' (2005, p. 230). Managing these often competing requirements can require a large investment in time by the HEI and is an activity not necessarily associated with more traditional higher education provision. Potentially there is a skills development need for some higher education workplace learning providers to enable them to manage relationships and contracting procedures. Even the language used by HEI representatives can create a barrier in creating partnerships, as Kinman and Kinman, drawing on the work of Salaman and Butler (1995), note: 'the language of academia is devalued and seen as negative, even pejorative' (2000, p. 15).

A predicted decline in the 18- to 21-year-old population indicates a possible reduction in the number of young people entering higher education (Leitch, 2006). The impact of this is that in order to maintain student numbers higher education providers may look to increase the number of mature students accessing higher education programmes. Workplace learning, therefore, is potentially a contributor to securing financial stability for HEIs, as QAA suggests, 'the skills required of the future workforce and the predicted demographic changes are encouraging [HE] institutions to become more flexible in the types of learner they recruit, the range of learning opportunities they make available and the modes of study they offer' (2010, p. 1).

In 2008 HEFCE, mainly in response to the Leitch Report (Leitch, 2006), awarded funding to HEIs to support 'Employer Engagement'. In a circular letter to Heads of HEFCE-funded higher education institutions HEFCE stated:

following the Leitch Review of Skills ... the higher education [HE] sector has responded very positively to the skills agenda ... we brought together a total Employer Engagement Fund package of up to £148 million over three years, of which up to £103 million was available for capacity building funding. This has enabled us to support a range of projects that will develop the capacity of institutions in working with diverse employers, provide learning programmes for employees, many of whom will not have previously experienced HE.

(HEFCE, 2008)

This injection of funding potentially appeared an attractive proposition to many HEIs, with 45 Employer Engagement projects (over a third of which were HEIs) being awarded funding. However, as suggested previously, workplace learning and employee engagement require a different approach to traditional higher education programmes of learning (Tallantyre, 2010b) and some HEIs may not have appreciated the specialist nature of this provision and the time required to build relationships with employers (this will be explored further in the literature review). The Wilson report suggests that 'The UK has outstanding potential in the field of business–university collaboration; it develops and attracts some of the best talent' (Wilson, 2012, p. 4). In a set of both 'formal' and 'reflective' recommendations the report set out how universities can improve and increase their work with industry. Noting, however, the difficulties that may exist, the report stated: 'Collaboration between universities in supplying business needs can only benefit the university sector as a whole. Universities may wish to reflect upon the concepts of collaborative advantage in meeting business needs and review their policies on the referral of business enquiries to other universities or relevant agencies' (Wilson, 2012, p. 10).

A further factor which might make workplace learning an attractive proposition to HEIs is the Government's introduction of a cap on the number of places available on higher education courses, and because university fees have increased (BIS, 2011), many young people may feel that they have reduced opportunities to participate in traditional academic programmes. This may not initially affect the

numbers accessing university courses but might increase the demand for work-based learning programmes, particularly where employers may fund all or part of the fees.

A synergy of work and learning can be seen to lead to a more productive and skilled workforce as opposed to learning being separate from work; therefore workplace learning can act as a bridge between the two. However, the implementation of successful workplace learning relies on a number of factors, including the motivations and amount of input provided by key stakeholders. As Brennan and Little (2006, p. 27) note:

Workplace learning as part of a higher education programme involves a number of players: the individual learner, their workplace/employer, and an external educational authority that recognises the learning as being valid in higher education terms. ... [These stakeholders] are strategically placed to determine the extent and effectiveness of workplace learning, and their actions may constitute 'enablers' or 'inhibitors' of workplace learning.

This may highlight the tension between policy commentary supporting the move for HEIs into more workplace learning, and employer engagement more generally. The academic research which identifies some of the problematic aspects discussed here will be explored in more detail in Chapter 2.

1.6 Focus of the research

Anecdotally, through having designed and delivered higher education workplace learning programmes to both commercial and public sector organisations, I have noted differences in how the programme has been communicated, supported, implemented and reflected upon within each of the organisations. The impact and effectiveness of programmes has differed not only in depth but in type of impact.

My research was intended to explore the context and effectiveness of workplace learning, focusing on how specific organisational practices influence the implementation, integration and impact of workplace learning programmes and what factors impacted on the perceived effectiveness of workplace learning. I wanted to find out why workplace learning programmes worked so well in some organisations and identify why they were less effective in others.

Workplace learning programmes are increasingly being offered by higher education providers and therefore knowledge within this area has much currency. My motivations for undertaking the research were that within HEIs that offer workplace learning, the results of the proposed research project might helpfully:

- Provide an indication of factors within organisations which might make the implementation of workplace learning more effective. This information

could provide a foundation for providers of workplace learning to negotiate a programme which accurately meets their organisation's needs.

- Provide a basis for providers to identify preparatory work which might need to take place within the organisation before a particular workplace learning programme can/should begin.
- Contribute to my understanding of how organisations which engage in workplace learning differ in the way they commission implement and support it.

1.7 The case studies and research participants

Two organisations were used as case studies for the research. Case study 1 focuses on a regional public sector organisation and case study 2 on a multinational company. In total, 17 participants were interviewed who were all managers. 15 of these were participants undertaking workplace learning programmes in leadership: one a certificate programme; the other a longer foundation degree programme (referred to henceforth as participants). The remaining 2 (1 from each case study), were employees of the organisations that had commissioned the workplace learning programme (referred to henceforth as the 'managers'). I have chosen these cases as the organisations have experience of workers undertaking higher education workplace learning programmes, delivered by the organisation I have previously worked for. Semi-structured interviews were used.

Both programmes were either developed or tailored to meet the needs of each organisation. Delivery methods included workshops, one-to-one coaching sessions, self- study materials accessed via an online learning portal and completion of case studies which were written specifically for each organisation by the workplace learning provider in conjunction with representatives from each organisation. These focused on particular issues facing the organisations and were related to programme content. Access to a university's online and physical library was also provided. Additionally, both organisations provided support systems which included support from line managers (formally and informally organised), mentors and 'master classes' where subject experts from the organisations presented to learners or the learners presented their own learning derived from engagement with the workplace learning programme. The organisational support systems which were in place differed between the two case studies and this will be considered further in later chapters.

1.8 Research questions

The research questions which emerged from the literature review are presented here for the convenience of the reader:

- 1 In what ways is workplace learning perceived as effective or not effective by employers and employees?
- 2 What are the features of organisations which impact on this perception of effectiveness and non-effectiveness?

3 What organisational practices might influence the effectiveness of workplace learning?

1.9 Structure of the thesis

Chapter 2 looks at the literature relating to how workplace learning is defined by its various stakeholders and how learning occurs considered from acquisition, participation and situated perspectives. It also looks at how organisations can expand or restrict employees' participation in workplace learning programmes, drawing on the work of Fuller and Unwin (2003, 2004, 2006). Informal or non-formal learning is also considered through an exploration of Eraut's research (2004, 2007). Following this is a discussion regarding relevant literature relating to the organisational factors that relate to effective workplace learning. This includes an exploration of the work of Billett (2002) and how individual agency impacts on the effectiveness of workplace learning.

Chapter 3 focuses on research methodology used in the study and the ethical approval process is explained.

In Chapter 4 the two case studies used in the study are explained and the process used for data collection and analysis is also discussed.

The data gathered from the research is illustrated from the findings across both case studies to explain the themes which emerged. Chapter 5 focuses on time

and Chapter 6 explores the findings relating to synergy between programme, organisation and learners.

Chapter 7 states my claim to new knowledge concerning the unique role and position of managers within workplace learning initiatives and reflects upon the extent to which I addressed the research questions associated with the study. The application of the conceptual framework as discussed in Chapter 2 is also explored. This is followed by a discussion into the potential implications for stakeholders in workplace learning and recommendations for further research.

1.10 Conclusion

This first chapter of this thesis has considered the context and aspirations of the research. It situates the research within the policy context that surrounds higher education workplace learning, introducing the key stakeholders and exploring the increase in HEIs offering workplace learning. The case studies used in the research and participants involved were briefly introduced and the research questions identified. Finally the structure of the thesis was briefly explained and the subject of each chapter identified. Having provided an introduction to the thesis, the next chapter will consider the literature associated with the research questions.

2 Literature Review

2.1 Introduction

This chapter will consider the literature linked to workplace learning and its effectiveness. The literature can be categorised into five main areas:

- Definitions and context of workplace learning.
- Theories relating to how learning occurs.
- The way organisations enable workplace learning and individual agency.
- Informal or non-scheduled learning.
- Organisational factors and practices which might impact on the effectiveness of workplace learning.

This chapter, therefore, will be structured around these five areas.

The review of the literature concentrated on workplace learning in general but, where possible, considered higher education workplace learning specifically. It noted wide variations in how workplace learning was defined. This was partly due to perceptions of workplace learning but also to differences in terminology.

'Work-based', 'work-related' and 'workplace learning' are often used interchangeably and can have the same but also different meanings.

The literature review draws from a variety of different sources including research literature, practitioner enquiry, government reports and papers and material

which leans towards advocacy; hence there is a need to be cautious about the ways in which published sources are deployed in this new field of enquiry. Each of these sources has strengths and weaknesses and can contribute different perceptions to the research. The review, however, tends to prioritise academic research as these sources tended to align more to the research questions, although government papers are heavily used in contextualising the workplace learning/higher education landscape and for defining key terms.

2.2 Definitions and context of workplace learning

Workplace learning in higher education can be defined in a number of different ways and arriving at a consistent and encompassing definition is problematic.

With regard to this, Brennan (2005, p. 4) suggests that:

The term 'work-based learning' is becoming ubiquitous, particularly in the context of discussions about vocational education at all levels. It is part of a cluster of concepts, including 'lifelong learning', 'employability' and 'flexibility', which are similarly ubiquitous, often employed rhetorically, and in consequence run the risk of being regarded as meaningless.

Brennan, therefore, is not only highlighting the complexity of defining workplace learning but also pointing to the risk of workplace learning being lost in an array of other types of adult learning delivery or concepts.

Definitions of workplace learning often focus on the differences between traditional learning which takes place within a location separate to work, that is, a college or a university, and that which is 'commissioned' or 'contracted in' by an employer from a learning provider, which is sometimes referred to by government-funded institutions as 'Employer Engagement'. The focus of HEIs working with employers was fostered by the *Leitch Review's* recommendation that there was a need to widen 'the focus of HE targets to encompass both young people and adults via workplace delivery. This will dramatically improve engagement between HE and employers' (Leitch, 2006, p. 140). Hogarth et al. (2007) identified five ways in which HEIs can engage with employers and their local communities:

- 1 Through graduate recruitment (as a supplier of highly skilled labour).
- 2 As a source of labour demand (many HEIs are among the largest employers in their localities).
- 3 As a source of lifelong learning (through continuous professional development and training (CPD)).
- 4 As a supplier of research and development (R&D), and the provision of support for the knowledge economy.
- 5 As a key player in a variety of economic development-related networks and partnerships (typically publicly funded through the UK/EU), and an important means of building new partnerships.

Leitch's primary focus, however, was lifelong learning for those already in work and therefore workplace learning was concerned with how HEIs engaged with employers and their level of responsiveness to employers' requirements.

Drawing on the earlier work of others, for example HEFCE (2005), DfES (2000) and Brennan and Little (1996), Harris takes a broad view when defining workplace learning. She suggests that it includes learning, support and assessment which

takes place in the workplace, through direct experience of the workplace environment and face to face contact with tutorial or workplace staff (HEFCE); Learning through work which is accredited and embedded within a [higher education] programme [HEFCE]; Learning [at higher levels] which is integrated with work [HEFCE]; Organised work experience as part of a programme of study [DfES]; Experience-led learning in the workplace i.e. the skills and knowledge which people acquire while doing their jobs ... [Brennan and Little]

(Harris, 2006, p. 89)

This indicates a breadth of learning activities that might encompass or support workplace learning, such as shadowing colleagues, reflecting on work experiences, workshops and opportunities to learn new skills via demonstration or instruction. The key overarching facet, however, is that for these activities to be deemed as workplace learning the content would need to be deeply rooted in the context of the learner's/worker's workplace. However, learning *for* work and

learning *from* work could relate to other forms of learning such as training courses and therefore is not exclusive to workplace learning.

Caldwell's explanation of workplace learning is equally broad, noting that "“workplace learning” includes learning opportunities physically located in the workplace ... and those organised in a workplace context ... that may encourage and support participation in courses provided outside the workplace’ (Caldwell, 2000, p. 245). However, this wide definition concludes that the learning which is linked to work can take place away from the workplace. Although Caldwell acknowledges the link to work practices, there is less emphasis here on work being the curriculum and the programme of learning being designed around the workplace. Therefore, it is questionable whether this can be regarded as workplace learning and is perhaps better defined as work-related learning.

Boud et al. define workplace learning as ‘the term being used to describe a class of university programmes that bring together universities and work organisations to create new learning opportunities in workplaces. Such programmes meet the needs of learners, contribute to the longer-term development of the organisation and are formally accredited as university courses’ (2001, p. 4). This places a more specific emphasis on the benefits to both the organisation and the individual learner undertaking accredited workplace learning. Boud et al. (2001, pp. 4–7) expand on this by suggesting six key characteristics of workplace learning. These are:

- (1) A partnership between organisation and university to foster learning.
- (2) Learners are employed in a contractual relationship with the external organisation.
- (3) The programme followed derives from the needs of the workplace and the learner's work is the curriculum.
- (4) Learners engage in a process of recognition of current competencies prior to negotiation of programme of study.
- (5) A significant element of the programme is through learning projects undertaken in the workplace.
- (6) The University assesses the learning outcomes against a trans-disciplinary framework of standards and levels.

An important facet of Boud et al.'s definition that sets workplace learning apart from work-related learning is the intrinsic link between the work tasks and role of the learner and the curriculum of the learning programme, resulting in the majority of learning taking place in the workplace. Implicit within this is an expected positive contribution to the organisation and its development as well as the learner's anticipated personal growth. However, the characteristics of workplace learning which Boud et al. suggest are potentially problematic in two respects: that relating to partnership and that relating to how learning occurs. There is an assumption that a partnership exists between the organisation and university which encourages and enables learning. My own experience indicates that this may not always be the case, with there being just a contractual arrangement in place. In relation to how learning occurs, Boud suggests that 'the

defining characteristic of work-place learning is that working and learning are coincident. Learning tasks are influenced by the nature of work and, in turn, work is influenced by the nature of the learning that occurs. The two are complementary' (2001, p. 34). Boud is suggesting here that working and learning occur or operate at the same time; however, this may not always be the case. Learning is also likely to require some facilitation (see Eraut's suggestion below on p. 64 that informal learning requires a person to enable the learning to be recognised and contextualised) and if this is not available the learning may not occur. In addition, some workplace learning might be in preparation for the future, for example to enable workers to take on leadership roles, and therefore does not reflect current work roles or situations. Therefore, work and learning may not always be coincident.

Boud et al.'s characteristics of workplace learning above are also problematic in that it is assumed learners/workers will undertake an assessment of their current competencies. This may occur in some workplace learning programmes where there is an element of reflection on one's skills; however, this may not be common practice in all programmes, for example in some post-qualifying programmes where the content may be set by a professional body. Who facilitates this exercise can also be problematic especially if undertaken by the employer, whose definitions of valued competencies may differ from those of the employee. There is also potential conflict between who decides what workplace learning is required. Additionally, other stakeholders, such as unions or in some

cases service users/customer groups, may have a view on what constitutes useful workplace skills and therefore what is useful and effective workplace learning.

The differing power relations between stakeholders will undoubtedly impact on the partnerships and subsequent workplace learning programmes that are developed. With regard to workplace learning Gallacher and Reeve (2002) suggest that there are four concepts which are of particular importance. These are:

- 1 Partnership.
- 2 Flexibility.
- 3 Relevance.
- 4 Accreditation.

According to Gallacher and Reeve, perhaps the most crucial of these is partnership – the partnership between the organisation and HEI, which requires flexibility.

Effective workplace learning therefore requires a commitment from the organisation and also flexibility from the HEI. In a later review of research on workplace learning partnerships, Reeve and Gallacher noted that 'the picture that emerges, from a number of sources, is one in which a very limited number of employers seem prepared to commit themselves to WBL programmes, and as we have seen, there is little indication that current trends in workplace organization will change this' (2005, p. 227). The picture here may have changed

in recent times due to the emphasis on workplace learning as being the panacea to the UK predicted skills shortage (see Chapter 1). Additionally, government funding for organisations to help fund the costs of workplace learning may make it a more essential and attractive proposal than other forms of learning.

Employers may underestimate the input required from them in terms of releasing employees from their work duties and giving them the support they need in order to make the workplace learning opportunity effective. They may also have to consider issues of time in relation to how much employees are required to contribute in order to engage fully in workplace learning programmes. This will undoubtedly impact on the success of a programme and how learning is assimilated into the workplace. Reeve and Gallacher suggest that 'While these practical differences are significant, they are very often compounded by differences in the professional languages and associated values that partners work within. Work-based learning partnerships, through their attempts to bring together employers and universities, are, of course, subject to just these pressures' (2005, p. 227). Furthermore, these difficulties with language and values can also extend to potential differences underpinning the philosophies held by both HEIs and employers regarding what is seen as valuable or essential learning. The 2010 QAA report into how responsive HEIs had been to employers with regard to workplace learning noted that tensions still exist, with one HEI representative highlighting the difference in philosophy in relation to the training versus education debate by stating that: 'Companies want control because they

are paying for a “service” and expect to get what they want, but the university is responsible for the development of its student cohorts. There is a tension between what is training and what education is’ (QAA, 2010, p. 30). The different priorities of learning providers and employers are also cited as a potential tension with one employer noting: ‘To an extent there is a clash of cultures; HEIs have to get things properly approved; employers’ priorities are the bottom line (just get it approved) – the expectations of HEIs in relation to QA [*Quality Assurance*] are not clearly understood by employers’ (QAA, 2010, p. 15).

As discussed in Chapter 1, the HEFCE and QAA Demonstrator Projects (QAA, 2010) explored higher education workplace learning. Of particular relevance to my research project is Lange and Dawson’s report entitled ‘Managing employer and cross-institutional partnerships’ (2010), which explored six case studies involving the delivery of higher education work-based learning programmes and the partnership arrangement which supported these. Lange and Dawson noted that challenges were present in partnership arrangements, and they reflected on the ways in which partners worked together to resolve them. They also noted the need to be willing to ‘change and adopt a more flexible approach to the delivery of teaching, learning and academic administration. To assure a quality learning experience, in the work-based learning context, amendments to traditional processes needed to be made’ (Lange and Dawson, 2010, p. 69).

Specifically in the Thames Valley University and Exeter case studies, the need to consider work schedules and work routines when planning workplace learning activities was highlighted as important. The UCLan and Manchester case studies noted the importance of responsive administration systems 'capable of dealing with non-standard partnerships and programmes delivered outside of the traditional academic calendar ... with dedicated staff' (Lange and Dawson, 2010, p. 70).

The need for academic staff who are delivering workplace learning programmes to have experience 'of workplace practice or, on occasions, to undertake additional training to prepare them for employer-responsive learning' (Lange and Dawson, 2010, p. 71) was highlighted in the Manchester and Exeter case studies.

Lange and Dawson noted that across all case studies, there was a recognition of the CPD needs of workplace partners, which included the manager's experience of providing mentoring (2010, p. 71). The authors' reflections, across all the case studies, include a call for 'promoting the capacity for local interpretation of the QAA guidelines at institutional level while maintaining nationally recognised standards, establishing a national database of partnerships to be used for comparative and dissemination purposes (*and*) making available resources for developing and extending partnership provision' (Lange and Dawson, 2010, p. 72).

Fielding (2010), in the report entitled 'Supporting employer-based staff who contribute to academic awards through design, delivery and assessment' explores the role of the mentor and how this supports workplace learning. She acknowledges the often complex position the workplace learner might find themselves in, suggesting that 'Students undertaking work-based learning are frequently balancing the demands of work, family and a new educational experience, which requires cultural acclimatisation and identity shifts for the learner. ... [They also have] to manage the differing expectations of other workplace learning stakeholders such as their employer and the HEI' (Fielding, 2010, p. 171).

Fielding postulates that mentors have a crucial role to play in supporting the workplace learner and uses the term to describe a range of employer-based staff who support a workplace learner through their academic programme. However, she notes that 'Where possible, mentees should not be matched with a mentor who will also be their line manager, as this can lead to ... conflicts when mentors are involved in formal assessment' (Fielding, 2010, p. 175). This links to the well-established debates in the caring professions (for example social work) about the dangers of being an employee's learning advisor and their assessor. She also notes differences between formal and informal mentoring schemes, and indicates the difficulties of informal arrangements with regard to equity and accessibility to/for workplace learners.

The Demonstrator Projects briefly discussed above provide useful practitioner insights into how leading providers in the higher education workplace learning field support workplace learning programmes. However, at this time, and also in response perhaps to the need for relatively urgent action, the focus of the Demonstrator Projects was on employer responsiveness rather than perceptions from workplace learners themselves. This initial lack of focus on workplace learners may have arisen from Leitch's assertion that the widening of participation in higher education to include workplace learners would 'dramatically improve engagement between HE and employers' (2006, p. 140), with the workplace learner or employee being absent from the discourse surrounding the workplace learning relationship. My own research differs in this respect because although it includes some perceptions from employers, its predominant focus is the perception of workplace learners themselves.

There is, therefore, the potential for conflict between the differing perspectives and needs of stakeholders, and ultimately certain criteria have to be met in order to meet the academic requirements of the university which may not necessarily meet the requirements of the workplace.

Definitions of workplace learning often focus around formal programmes of learning. Rainbird acknowledges this as one type of learning which occurs in the workplace but also highlights the significance of informal learning opportunities:

'[T]he workplace is enormously significant as a site of learning, both for accessing formal learning opportunities and for many informal learning opportunities which result from the nature of work and from social interaction with work groups' (2000, p. 1). However, she goes on to note the contested nature of defining learning at work, stating that it is 'highly problematic: its primary purpose is not learning, but the production of goods and services, involving the creation of profit in the private sector, or delivery within budget in the case of the public sector' (Rainbird, 2000, p. 1). Here Rainbird is acknowledging the potential for tension between the purpose of the workplace as a provider of services or producer of goods and being a site for learning. The primary focus of the workplace is the former with the site for learning being secondary. For workplace learners, therefore, their learning may be seen as secondary, whereas when workers are attending more traditional forms of learning away from the workplace, for example at college, learning is the primary focus and as a result may be given more value and priority. Learning within the workplace also means that the learner/worker is more accessible and may become involved in work-related tasks, whereas learning away from the workplace means these interruptions may be less likely or infrequent.

With regard to this and the research I have undertaken 'effectiveness' can have a multiplicity of meanings for workplace learning stakeholders and therefore needs to be defined and contextualised to the organisation, individual parts of the organisation, teams and workplace learners themselves. Definitions and

perceptions of effectiveness will also be held by workplace learning providers and may be more aligned to academic achievement, an issue which needs to be considered in relation to organisational expectations. However, this may mean some level of compromise for all stakeholders involved.

Views regarding what activities constitute workplace learning can be influenced by the particular agendas which sit behind the definitions offered. Policymakers and employers may wish to take a broad view of workplace learning as informal learning and learning 'on the job' that has little or no cost and can therefore be seen as an attractive and cost-effective proposition. Workplace learning providers may be reluctant to acknowledge less formal types of learning without rigorous recording and assessment to prove its worth, particularly in relation to accredited courses. Also, the value given to more informal types of learning may differ depending on the role taken within an organisation. Coetzer's research into attitudes towards learning and work (2007) noted that most workers, with the exception of managers, believed they learnt most from their colleagues. This indicates that my own research instruments will need to be mindful of the broad meanings participants might give to workplace learning, rather than focusing on formal learning only. Participants in Coetzer's study who were workers operating at lower grades within the organisations may have placed higher value on informal learning, whereas middle and senior managers participating in the research may, according to Coetzer, have seen this type of activity as having lower value. This might be because the social aspects of learning seem to be

more important for more junior workers or could relate to the perceived higher value of formally recognised qualifications by managers.

Having considered various definitions of workplace learning, my own definition for the purposes of this research is most closely aligned to that of Boud et al. (2001). Concurring with my own experiences of workplace learning, their research relates specifically to higher education and encompasses the tripartite relationship within workplace learning between the organisation, the university and the learner. Furthermore, it also considers the role of workplace learning in organisational development by noting that programmes of this type 'contribute to the longer-term development of the organisation' (Boud et al., 2001, p. 4). Thus, it is Boud et al.'s definition that has been the major influence on the initial and main study in formulating the research instruments used.

To summarise, then, the review of the literature thus far has considered definitions of workplace learning and demonstrated the myriad of different definitions that exist. The review also indicates the multiplicity of meanings that surround workplace learning, suggesting that this type of learning can encompass a programme situated within work where the core elements of work and the student's employing organisation are central to both the content and the structure of delivery. The term workplace learning can also be used to define programmes which are delivered away from the workplace but use work as a focus for learning. It can also be used to refer to learning derived from

undertaking day-to-day work tasks or instruction from/reflection with colleagues. In addition to this, a variety of activities can be associated with workplace learning including informal learning with colleagues, which is often valued as an important vehicle for learning within the workplace.

The complexities associated with defining workplace learning influenced the design of the initial study and therefore participants were asked to give their own definition of workplace learning. Analysis of the data on the initial study led me to question who has the power to define workplace learning and its purpose within the workplace. Broad definitions continue to be used because this serves the interests of each stakeholder in the workplace learning relationship (learner, organisation and provider) equally well. Potentially, a definition that allows the employer to use a more blended approach towards learning which might include more self-study and less time 'off the job' could serve their interests better but place more responsibility and demands on employees/learners. Less time off the job might mean that organisational operations are less affected as workers can participate more in their usual work activities, but it does shift more of the workload attached to the workplace learning programme to participants, meaning that learning may have to be accommodated into the learner's non-work hours. This aspect was considered further in the main study as it was important to ascertain the participants' own definitions and perceptions of workplace learning and the activities associated with it so that their responses to other questions

about the workplace learning programme and organisation could be seen in context.

2.3 How learning occurs

How one chooses to define workplace learning will depend on the philosophical stance which sits behind each definition and therefore it is important to understand some of the debates around how learning takes place. Brennan and Little (2006) suggest that there are three schools of thought: learning by acquisition, where knowledge is seen as being independent to the person and therefore needs to be acquired; learning through participation, whereby learning is perceived as taking place when others are involved; and situated learning, which focuses on communities of practice and a more informal approach to learning. Clearly the latter two are related to each other as they both involve interaction with others. The first school of thought is often referred to as the cognitive approach, that is, learning occurs in the brain (for example through memory, knowledge), while the other two are both seen as situated approaches, which is learning that takes place with the involvement of others.

With regard to how learning occurs, Sfard (1998) identifies two metaphors in relation to learning: acquisition and participation. The acquisition metaphor (AM) is concerned with the idea that knowledge is an object which can be acquired and developed, therefore owned by the individual and can be shared and applied to relevant situations. This is perhaps the traditional way of learning and can be

seen in the way learning was, and sometimes still is, facilitated by a 'teacher' who is seen as giving knowledge to the learner. The participation metaphor (PM) replaces having knowledge with knowing ... and knowledge with being able to undertake an activity (Sfard, 1998). It is important to note as does Sfard below that these metaphors do not simply try to separate individual and social views of learning:

[T]heories that speak about reception of knowledge and those that view learning as internalization of socially established concepts belong to the same category (AM), whereas on the individual/social axis, they must be placed at opposite poles. Whereas the social dimension is salient in the PM, it is not necessarily absent from the theories dominated by the AM.

(Sfard, 1998, p.7)

The acquisition and participation metaphors therefore should not be seen as in opposition but complementary, with Sfard pointing out that 'to have just one metaphor would be problematic' (1998, p. 7).

Sfard's metaphors interpret the essential features of learning differently. For example, the acquisition metaphor would view the teacher as the provider or facilitator. Using the participation metaphor, the teacher is seen as a participant (with greater expertise), preserving relevant discourse. Using the acquisition metaphor, knowledge is seen as a commodity or property, the participation metaphor views knowledge as a part of activity (Sfard, 1998).

Sfard's model of two metaphors to explain how learning occurs is perhaps limited in its explanation of learning via participation. As stated previously (page 44), Brennan and Little (2006) suggest a third dimension of 'situated learning' which focuses on communities of practice and therefore places higher value on the interactions between learners as a vehicle for learning. Other authors (Hager, 2004; Elkjaer, 2003) have suggested that Sfard's theory does not consider other metaphors to explain this type of learning. Hager suggests that Sfard's theory needs expanding to include '*construction (or re-construction)*' and postulates that this metaphor 'includes the construction of the learning, of the self, and of the environment (world) which includes the self' (2004, p. 29). He expands on this by suggesting that this metaphor 'with its tripartite focus on the construction of learning, of learners, and of the environments in which they operate, has a wider scope. One in which change, learning and human flourishing are inextricably enmeshed' (Hager, 2004, p. 30).

Elkjaer suggests that an inquiry metaphor exists and could be used as a way of creating organisational learning and learning organisations. This builds on the knowledge acquisition and the participation metaphors and can be used to explain how organisations might create an 'experimental arena for learning in which employees are able to engage in inquiry into workplace problems and, by doing so, develop their experiences with work and workplaces' (Elkjaer, 2003, p. 481).

In relation to how learning occurs, and drawing on his research undertaken with engineers, Senker (2000, p. 230) noted:

Learning and performance are highly dependent on contextual factors and cognitive processes are tied to the context at the time of knowledge acquisition. Learning does not occur naturally; it involves active mastery, which is a process of internalization ... The acquisition of some types of knowledge and skills tends to be more context-dependent than the acquisition of other types of knowledge. In particular, the acquisition of articulated knowledge may be less context-dependent than the acquisition of tacit knowledge.

Although he is a cognitivist, Senker here is demonstrating empathy with a situated approach to learning and suggesting that knowledge acquisition may have a situational perspective.

While acknowledging that the metaphors outlined above should not be polarised, my own view regarding how learning occurs favours a more participative or situated approach, rather than learning through acquisition. However, the purpose of workplace learning also requires consideration in that it can be seen as being for organisational development or individual benefit which then leads to positive organisational changes. This was a theme highlighted in the initial study with regard to how organisations perceived the benefits of workplace learning.

However, many organisations may not feel a need to separate out individual and

organisational learning. Additionally, there may be tension between content knowledge and situated knowledge specific to each workplace. Organisations may guard against generic skills development as it may attract workers to other employees and increase the individual's career prospects. On the other hand, situated knowledge development may be seen as more valuable to the organisation but potentially perceived as less valuable by individual workers. Elkjaer's inquiry metaphor (2003) demonstrates the importance that some workplace learning commentators place on organisational learning and this resonates with my own views.

One of the seminal contributions to the situated knowledge debate and how people learn within work has been made by Lave and Wenger (1991). They consider the role of the apprentice or newcomer within a learning (or work) context which they refer to as a 'community of practice' and define as 'a set of relations among persons, activity and world, over time and in relation with other tangential and overlapping communities of practice' (Lave and Wenger, 1991, p. 98). They consider how 'new-comers' learn from existing, more accomplished colleagues and argue that apprentices need to learn not only the skills of a particular trade or profession but also the social dynamics of a particular work or learning situation. In a later article entitled 'Communities of practice and social learning systems' (2002), Wenger expands on his earlier work with Lave and discusses the concept of 'Social learning theory', which suggests that learning is a much broader concept than traditional, educationally based learning. He

considers that within communities learning takes place when ongoing and new experiences require members to re-evaluate their ideas around knowledge and competence (Wenger, 2002).

There has, however, been a growing tendency to look more critically at Lave and Wenger's views on communities of practice. Fuller and Unwin (2006) in particular have criticised how Lave and Wenger focus on newcomers within communities of practice, neglecting how established members develop and learn. They also note the absence of a detailed analysis of the influence of workplace organisational culture on the experiences of members of a community of practice and how such an analysis might highlight potential barriers to learning (Fuller and Unwin, 2006, p. 29). Also, it is important not to assume that communities of practice will always make a positive contribution to workers. In relation to her research in schools, Thorpe (2003, p. 6) urges

caution against any assumption that practice communities per se can be relied upon to foster peer learning and the *development* of their practice as well as its replication. The process of developing learning and knowledge, and fostering practical change, depends on understanding causal effects, processes, outcomes at different levels ... This is a labour intensive and uneven process.

Here Thorpe is highlighting how assumptions that communities of practice provide a positive site for learning and knowledge should be challenged and how a number of factors can impact on how effective these can be. These factors

could include the type of work undertaken and how much freedom workers have to manage their time. For example, shift workers may find it easier in some respects to get their shift covered in order to engage in a workplace learning workshop; however, they may find it harder to make time within a shift to undertake informal workplace learning if their work requires constant attention or input, for example factory lines, nursing. More senior workers or managers may have the ability and licence to manage their own time; however, this may be a positive or negative factor: positive in that they can manage their time, negative in that they may not feel they can allow themselves time to undertake activities related to workplace learning when work tasks are their priority.

Following research into the contemporary effectiveness of Lave and Wenger's work, Fuller et al. (2005, p. 64) suggest that

further dimensions need to be added to Lave and Wenger's original account ... experienced workers are also learning through their engagement with novices, and that part of the process of legitimate peripheral participation for many novices is to help other workers to learn. This insight is of significance as it helps undermine the view of communities of practice as unchanging.

I would agree with Fuller et al.'s views here in that Lave and Wenger's communities of practice oversimplifies the complex processes that may exist within learning from others in the workplace, and the absence of any consideration of the learning which takes places for experienced workers is striking. Further critique of Lave and Wenger comes from Hodgkinson and

Hodkinson (2004). Drawing on their research into schoolteachers' workplace learning they note that communities of practice can be very varied and often individuals (in this case, teachers) might belong to a number of overlapping communities. This makes it difficult to define the precise location of learning. Additionally, they suggest the need to adopt different terminology in relation to learning, stating that:

Situated learning, or learning as social participation, are better terms than communities of practice to capture the underlying essence of Lave and Wenger's (1991) theoretical approach. The field of practice or learning field ... may be better terms than community of practice to represent the view that learning is ubiquitously social.

(Hodkinson and Hodkinson, 2004, p. 28)

A final consideration here is the absence of the individual, their contribution, motivation and influence within situated learning activities. Many factors, such as time and workload pressures, personal circumstances, level of confidence, licence given from individual managers and perceptions of value, may affect an individual's ability and motivation to be involved in communities or practice. This can have a huge impact both on the experience for individuals and on their contribution to the learning of others, and potentially requires more consideration of the theories which surround this area.

The literature contained in this part of the review is helpful in explaining, within the context of this research, how learning may occur within the workplace. These

theories are useful as they will enable the data collected to be analysed with regard to how workplace learning is described by the participants. It will also inform the research and support data analysis in relation to how organisations organise workplace learning programmes and which types of learning and philosophy underpin this. Finally, these theories are helpful in attempting to understand the context of learning and the relationship between the workplace context and learning.

2.4 How organisations enable or restrict access to and participation in workplace learning

Fuller and Unwin (2003) developed an alternative perspective with regard to understanding workplace learning in the context of organisations and how people learn through apprenticeship 'to help understand and categorise the barriers and opportunities to learning being experienced by modern apprentices' (p. 411). The framework was developed initially with apprentices in mind as part of the Teaching and Learning Research Programme's network of five projects that explored the contemporary workplace as a site for learning, but was quickly assimilated into the work of other projects within the programme where the research team developed frameworks to consider other approaches to workplace learning. These approaches focus on how the organisation can expand or restrict access to workplace learning and according to Fuller and Unwin 'take us beyond Lave and Wenger's (1991) reliance on the metaphor of "learning as participation" which works well for the sorts of traditional craft-based activities that they focus

on, but less convincingly for the complex industrial and commercial settings we are investigating' (2003, p. 410). Of particular relevance to this research project is the expansive and restrictive framework developed for workforce development, some features of which are listed in the table below:

Table 1 – Fuller and Unwin's Expansive and Restrictive Framework (Workforce Development)

Workforce Development	
Expansive learning environment	Restrictive learning environment
Opportunities for training on and off the job	Narrow range of on-the-job training
Knowledge and skills development through participation in multiple communities of practice	Restricted participation within a single community of practice
Planned time off the job for knowledge-based courses and reflection	Virtually all on job: limited opportunities for reflection
Access to knowledge-based qualifications	No access to knowledge-based qualifications
A structure for progression	No structure for progression and gaining new skills

(Source: Fuller and Unwin, 2004, p. 142)

Many of the statements contained in the framework may be open to different individual interpretations. For example, in a law firm 'structure for progression'

could be interpreted in a vastly different way depending on whether you are an administrator or a solicitor. Progression and what it means can also be wide-ranging, with individuals having different perceptions depending on their circumstances, aspirations and previous experiences.

Additionally, some of the areas contained within the framework represent extremes and the approach of many organisations to workplace learning may sit between these. The framework may appear to be a little rigid; it does not consider different types of workers with different learning needs or experiences, for example. It potentially takes quite a generalist view towards groups of individuals and fails to take into account how individuals interact with their employing organisation. With regard to how individuals might experience the framework, Evans and Kersh (2004) undertook research which considered the perceptions of re-entrants to the workforce. Sixty adults studying at six different colleges within and just outside London were asked to consider whether an organisation was expansive or restrictive. Evans and Kersh found that experiences were dependent on whether the individuals concerned felt part of a team (expansive) or not (restrictive). How workers experience their workplaces appeared to depend on factors such as types of workplace environment – stimulating versus dull; recognition of employees' skills and abilities; and opportunities for workplace training and career development (Evans and Kersh, 2004). This perhaps indicates that personal preferences, characteristics or individual priorities can affect perceptions of whether a workplace is expansive

and restrictive, an issue which does not feature in the Fuller and Unwin framework.

Evans and Kersh also suggest that employees themselves contribute to whether the work environment is expansive or restrictive, indicating that there is interaction between the employee and workplace which influences the expansiveness. Consequently, those who see their work environment as restrictive may do little to change this (Evans and Kersh, 2004). This suggests that an employee's perception of the extent to which their workplace is expansive is dependent on a number of factors and also that not only does the organisation contribute to this perception but so do the employees themselves. Some workplaces by their very nature, for example health and social care, have problematic work routines and responsibilities, such as the need to provide 24-hour services and workers being unable to leave their work responsibilities to participate in workplace learning. This is a factor which would be difficult to address; consequently the Fuller and Unwin framework detailed above may be a little unhelpful in this regard within some sectors. However, research within two NHS community units undertaken by Munro and Rainbird (2000) noted that an individual manager and their approach to supporting learning could have a large impact in how accessible learning and development opportunities are. In researching two units with differing managerial approaches to learning and development they noted in relation to the unit described as expansive that high value was given to learning and development, workers were expected to share

their learning with other members of the team and the manager ensured that workers were given time to participate in learning opportunities (Munro and Rainbird, 2000). This indicates that health and social care services can be expansive where a high value is placed on learning and therefore, even in highly structured environments, the work undertaken may not always make the workplace restrictive. The importance of local managers and their individual approaches to enabling their staff to access and engage with workplace learning opportunities also needs to be noted.

Felstead et al., building on Fuller and Unwin's expansive and restrictive approaches, explored the idea of 'productive systems', describing them as comprising 'the totality of social relationships entailed in processes of commodity production. They are constituted by the multiple, interlinked social networks through which economic activity is organized, and commodities are produced and consumed ... Productive systems, then, are networks of networks, 'worlds within worlds' (cf. Jewson 2007; Unwin et al. 2008)' (Felstead et al., 2009a, p. 18).

Using the example of a software engineering company which participated in their research, Felstead et al. (2009a. p.14) noted:

[The company] appeared to have the most autonomy over its own destiny.

The company's corporate status is that of an Employee Benefit Trust so it exists within a productive system which has a very compressed vertical

structure. The software engineers benefited from being part of a productive system that placed considerable emphasis on the nurturing of young talent for the benefit of the overall continuity of practice. As a result, they displayed a strong sense of confidence in both their current positions in the company and their future careers.

They go on to argue (2009a, p. 18) that

[The] understanding of workplace learning in its fullest sense requires the analytical reach offered by the productive system perspective. It allows us to investigate where effective control over the whole productive system is located and how this impacts on learning within any particular workplace. It highlights the importance of establishing the locus of power within the productive systems as a whole.

They cite external influences including national government, state institutions and regulatory bodies, and internal influences such as senior management and shop-floor workers (Felstead, et al., 2009a).

Felstead et al. use the notion of power in organisations and its impact on workplace learning more heavily than other workplace learning commentators. However, locating power within organisations can be a complex process and often cannot be done explicitly. Workplace learning programmes are often located within established and ongoing power structures and therefore, spending time analysing this and the potential impact may not be feasible.

Although the expansive and restrictive approaches framework and related approaches may have some limitations, they are helpful in exploring the nature of organisations. This concept influenced the schedule for the research interviews as it seemed important to establish what organisations do, or not do, to support or restrict workplace learning.

This focus on the way in which the workplace can influence the participation in and effectiveness of workplace learning is intrinsic to Billett's work on affordances (2002). However, he also recognised the importance of individual agency and how this impacted on workplace learning. In relation to organisational culture and learning Billett notes that 'rather than being benign, social practices in workplaces can be highly contested. Workplace hierarchies, group affiliations, personal relations, workplace cliques and cultural practices influence the participation and guidance afforded to individuals' (2002, p. 462). He talks about the 'affordances' that the workplace provides to enable learning to take place, suggesting that they 'constitute the invitational qualities which will be extended to and perceived by individuals, and which in turn will shape their participation' (Billett, 2002, p. 462). The relational interdependence of the employee's engagement with the workplace and how opportunities are afforded on the basis of affiliations, workplace goals, position within the organisation and other social factors is key to Billett's work. However, he also notes that these affordances are constantly shifting; therefore

the intersections that constitute the interactions in workplaces are those through participation in work. Changes in work practice are brought about by historical factors (e.g. changes in tool and technologies), cultural factors (e.g. needs for particular products services) and situational factors (e.g. the goals, practices and participants in the workplace).

(Billett, 2002, pp. 466–7)

Billett also points out how individual agency affects learning, suggesting that individual learning is likely to be linked to the worker's/learner's history and experiences. Therefore, individuals who have had a negative learning experience might approach workplace learning opportunities with some trepidation. Additionally, other factors such as culture, or situational factors such as work patterns and location will mediate a worker's engagement with workplace learning (Billett, 2002).

Billett highlights the importance of motivation with regard to the effectiveness of workplace learning, suggesting five bases for motivation to engage with workplace learning opportunities. These are: '(i) satisfaction with performance; (ii) improving performance; (iii) self-interest; (iv) self-motivation; and (v) advancement' (Billett, 2002, p. 472). But according to Lee et al. (2004a p. 29) Billett's work can be seen as problematic in two ways:

[Firstly,] the notion of interdependency rests on a distinction between structure and agency which, [...], cannot be sustained. Secondly ... agency has been both over emphasised and over-played. Although Billett points to a broad set of factors through which learning affordances are distributed ... he does not discuss how through these factors, agency is itself something which is (or is not) 'afforded'.

Billett gives limited consideration to the impact of social factors, such as class, gender and life experiences on the individual's ability to participate but rather perceives that everyone has the same ability to do this, that is, exercise agency.

Consideration of learners' biographies and past experiences is crucial to understanding their motivation for and participation in workplace learning, particularly in relation to the participants from case study 1, many of whom discussed how they were close to retirement. Following a study of one hundred workers, Bimrose and Brown suggested that 'For older workers the biographical dimension of an individual's past and their current understanding of their past experiences of work, learning, careers and identities (their career story) was also likely to be significant' (2009, p. 208). They conclude from their research that 'workplaces and educational institutions could consider how best they can effectively support older workers' learning, development and work transitions. This could include identifying appropriate learning strategies and pedagogic practices that will assist the development and maintenance of older workers'

capacities for working, learning, development and transitions' (Bimrose and Brown, 2009, p. 220).

The ideas of Bimrose and Brown and those of Billett are useful to the research project as there is a link to how organisations enable learning and affordances, and I use Billett's ideas to analyse the data on the affordances the organisations involved give to workplace learning and individual agency in contributing to this.

The literature detailed in this section of the review helped to formulate the research questions by considering affordances (Billett) and how expansive or restrictive (Unwin and Fuller) organisations are to workplace learning, with some consideration of the needs of more mature workers and learning through the lifecourse (Bimrose and Brown). The expansive/restrictive framework takes a wide view of organisational practices relating to effective workplace learning, whereas Billett's work looks more at how individuals or groups of individuals are supported or given affordances to engage in this. Therefore, these two concepts are useful to the research study to explain how expansive/restrictive organisations are towards workplace learning programmes and how the interaction of individual agency or motivation and organisational support for learning impacts on how effective this provision is.

2.5 Informal or non-formal learning

Having considered theories around how learning occurs and what organisational factors might impact on effective workplace learning, this review will now consider informal or non-formal learning. This type of learning happens in the workplace but is not usually formally scheduled; nevertheless, it is still considered an important facet of workplace learning.

Eraut (2004) suggests that all learning takes on formal and informal characteristics, but he argues that there is an important distinction to be made in terms of whether the learning that takes place is intended. With regard to this, he offers the following classifications:

- Deliberative learning (conscious, planned, with a definite goal)
- Reactive learning (near spontaneous – varying degrees of intention – little time to think)
- Implicit learning (no intention to learn and lack of awareness that it has taken place)

(Eraut, 2004, p.250)

Eraut explored these concepts through research that considered how newly qualified or graduate nurses, engineers and accountants learned at work in the first three years of employment. He noted that for "the majority of workers" learning occurs in the workplace itself. Formal learning contributes most when it is both relevant and well-timed, but still needs further workplace learning before it

can be used to best effect' (Eraut, 2007, p. 419). Support from one's manager was cited as enhancing learning, as was how 'The quantity and quality of learning [could] be enhanced by increasing opportunities for consulting with and working alongside others in teams or temporary groups' (Eraut, 2007, p. 420). He also noted that learning and working alongside others appears to be a pivotal influence on the effectiveness of workplace learning activities. Workplace learners, from my own observations, often report positive experiences of unplanned learning, where colleagues will spontaneously work on a problem, perhaps using tools or knowledge gained from an organised workplace learning programme. However, all the participants in my case studies were managers, which raises questions about Eraut's work on the study discussed above and how managers are explained and encompassed into his suggested framework.

Managers are also learners with potentially their own particular set of workplace learning requirements, and this is not adequately addressed by Eraut. A particular issue here is autonomy. To what extent do organisations enable managers undertaking workplace learning to manage their own time to meet the requirements of the programme, particularly the less structured elements of the programme such as self-study, and how much freedom do those managers have to implement learning from the programme? Managers may have different capacity in terms of both time and expertise to support the learning of the people they manage and this may impact on a workplace learning programme's effectiveness for individual participants.

In relation to how knowledge is transferred from education to the workplace, Eraut (2004, p.256) suggests that there are five interrelated stages:

1. The extraction of potentially relevant knowledge from the context(s) of its acquisition and previous use;
2. Understanding the new situation – a process that often depends on informal social learning;
3. Recognizing what knowledge and skills are relevant;
4. Transforming them to the new situation;
5. Integrating them with other knowledge and skills in order to think/act/communicate in the new situation.

Implementation of learning and the support required to do this is often an area neglected by workplace learning programmes. A learner is likely to require a person with appropriate skills to coach them through this process, a factor which Eraut does highlight. Many organisations might argue that they simply do not have the resources to support learners to this extent and this may also depend on the learner having a manager who is willing and able to provide this support alongside other workplace duties. However, this may be a key factor in the effectiveness of workplace learning programmes and the link between informal, non-formal and formal learning will therefore need investigation.

In relation to how learning is supported by others, Senker's (2000) work drew similar conclusions. Drawing on the work of Vygotsky, he suggests that

Vygotsky's analysis of the relationships between teaching and learning is extremely complex ... Essentially, while people can accomplish more with help and support than they can alone, they can only learn what is within their range: within their 'zone of proximal development' (Newman and Holzman, 1993). If there is a training intervention, and the aims and content are remote from existing experience in content or time, then it may be rejected.

Experiential learning derived from interaction with the working environment is often more effective (Kolb, 1984).

(Senker 2000, pp. 231–2)

Therefore, working and learning with the support of others might be regarded as more valuable than individual learning; however, this might also be seen as requiring more input from the organisation than they are willing or able to provide.

There is a general assumption that learning alongside or supported by others is 'a good thing' and will no doubt result in a positive experience. Guile argues that 'inter-professional work has been a growing feature of work in the global economy since the 1990s' and that changes in the way work is organised, that is, to a more 'project work approach' have led to an increased 'prominence of inter-professional working and learning' (Guile, 2012, p. 79). He goes on to say that 'debates about the contribution of disciplinary knowledge to professions formation have marginalised discussions about inter-professional work and learning' (Guille, 2012, p. 79). He suggests a process of recontextualisation which includes helping employees to consider 'that they are operating in a

“conceptualised” environment, in other words, an environment that has been created through the work of their own and other professions’ and concludes that ‘Theoretical concepts are an embodied feature of both their theoretical and practical reasoning and, in the process, help them to appreciate that the two modes of reasoning are both different and related’ (Guille, 2012, p. 96). Guille (2012) is suggesting here that workers should rethink their approach to learning and work with others across different professional disciplines and combine practical and theoretical reasoning to identify solutions to work-based problems in informal settings.

Using work-based problems as a vehicle for formal and informal workplace learning activities is not uncommon and, from my own observations, I consider this to be a valuable experience both for individual learners and for organisations generally. The latter often leading to an increase in efficiency or improved customer service. Workplace learning often uncritically adopts many of the learning activities associated with more traditional forms of learning. However, some of these activities are particularly well associated with workplace learning due to the significant level of reflection on real-life situations and the contextualisation of difficulties which is more successfully achieved when working with others from the same or a similar work context. An example of this is the use of Kolb’s Learning Cycle (Kolb, 1984 in Armitage et al., 1999, p. 67) which is often utilised in workplace learning/training contexts to enable workers to reflect on work-related experiences. Within this, learning is perceived as following a

four-stage cycle that begins with 'concrete experience' and is followed by observation and reflection on the experience. Next comes the formation and testing out of a hypothesis involving abstract conceptualization and then the cycle may repeat itself (Kolb, 1984 in Armitage et al., 1999, p. 67). Models of reflection appear to be intrinsically linked to workplace learning. However, very little consideration seems to be given to the skills required by managers, as suggested by Eraut (2004), to successfully facilitate and enable them to be useful and meaningful for participants.

Action Learning Sets are an example of learning activities used in workplaces to enable workers/learners to consider work-based issues and to enable people to learn through shared learning. Jaques (2000, pp. 182–3) defines them as a framework

for groups (known as sets) to deal with issues and problems of their members in a way that ensures a clear focus on the needs of each. In the sets, the focus is on problems that individuals bring and the action that results from the structured attention and support given by the group.

How and if Action Learning Sets are used will depend on the value placed on them by employers and learning providers, the priority they give to them and how much time employees are given to participate in them. It is questionable whether Action Learning Sets can be regarded as an informal or unstructured learning activity as they require their members to schedule a period of time to participate. The accessibility of Action Learning Sets as an informal learning activity is likely

to be confined to workplaces where employees are able to stop working on current tasks in order to participate, as discussed previously; therefore they may be more aspirational than practical in some work contexts. Informal learning activities may also rely on the value, licence and priority more senior managers give to this type of learning.

Work context and factors as explored in Fuller and Unwin's expansive/restrictive framework (2004) can impact on both formal and informal workplace learning activities. Previous discussions (see above) in relation to more formal or planned learning considered the support and 'licence' provided by the organisation to enable the integration and assimilation of learning into the workplace and noted how this is crucial in order for workplace learning programmes to be effective. This appears to be relevant to unplanned or informal learning, too.

The literature in terms of unplanned or informal learning, knowledge exchange and associated learning activities offers further insights into effective workplace learning. It also raises the issue of how unplanned learning can be captured and what support might be needed in order for this to happen. The literature here has been used to formulate the research questions and subsequent interview questions to ensure they encompass informal learning. The literature will also be used to analyse data on how organisations support informal or unplanned learning to reinforce their support for formal workplace learning.

2.6 Organisational factors affecting impact and effectiveness

The literature review will now explore theories relating to organisational features and practices which impact on workplace learning and its effectiveness. The way in which an organisation deals with its employees and the day-to-day practices they follow are to the organisation's culture. Schein (2010) notes that culture has many meanings; however, he offers a definition which 'puts the emphasis on shared learning experiences that lead to shared, taken-for-granted basic assumptions held by the members of the group or organisation' (p. 21). Shared learning experiences often lead to organisational development.

The culture that exists within an organisation is likely to impact on how learning is delivered, supported and received. As previously discussed productive systems and how they operate also contribute to organisational culture and therefore the success of workplace learning. Felstead et al. (2009a, p. 23) argue that power relations and productive systems have 'a direct effect on the forms and outcomes of learning at work'.

A learning organisation can be defined as 'an organisation that enables individual learning to create valued outcomes, such as innovation, efficiency, environmental alignment and competitive advantage' (Huczynski and Buchanan, 2007, p. 124). Learning organisation theory attempts to identify whether or not organisations that encourage this type of learning and support exhibit particular features.

However, the crucial tenet of learning organisation theory is that there is no 'standard' effective approach to aspire to and that each organisation may follow a different path or have a different set of features in place to support the creation or continuation of a supportive working and learning culture. Each organisation has to find a way to achieve this which is consistent with the prevailing organisational culture, work practices and organisational priorities, norms and values.

Organisational culture and learning theories are a well-established area of management studies and has been subject to much critique, particularly in relation to its aspirational nature. In relation to the research presented in this thesis, the theories have some relevance but are outside my broader line of inquiry.

In relation to culture and how it affects learning specifically, Bishop et al. (2006) draw on the work of other writers (Marsick and Watkins, 2003; Senge, 1990; Schein, 1987) to explain how learning occurs and impacts on organisations and suggest a model of learning-supportive culture. The model identifies three areas:

Tacit assumptions/values, the features of which include interactions between members of the organisation or group that are normally expansive rather than restrictive in nature; expansive collaboration is more productive than individualism.

Explicit beliefs/norms, which include where the acquisition and sharing of 'useful' knowledge would be encouraged and rewarded and all members/employees have easy access to knowledge resources.

Practices/artefacts, the features of which include flexible and expansive job design to empower employees to exploit new knowledge and accessible knowledge management systems.

Although this model is not presented as a comprehensive list of the features of a learning supportive culture, it could be argued, and indeed the authors acknowledge this, that the model is a little generalist and may not be applicable to all situations and organisations. Ashton and Sung (2002) argue that such practices, if implemented, will have little effect if they are not supported by underlying assumptions. For example, systems designed to facilitate devolved responsibility for decision making will have little impact on performance if there is still a general assumption of low trust within the organisation. Johnston and Hawke (2002) suggest that there is no one model of organisation, which presents a challenge when attempting to create a model of learning that is useful for all organisations.

While acknowledging that learning can take place in workplace settings, Barnett proposes that this is not a certainty. In many situations, where work is perceived to be of a menial nature or where people in senior management positions feel that they do not require training or development, learning may not routinely take place (Barnett, 2002). Furthermore, within organisations, learning opportunities

and how they are offered and supported can be perceived as having additional meanings. Rainbird (200, p. 2) notes that

the training and development of staff has symbolic dimensions: it may be regarded as a reward, giving status where there was previously little. Also it may serve as recognition for effort and a signal of value to the organisation; and it may indicate suitability for promotion. Equally, it may be perceived as a threat, an indicator of poor performance or the forerunner of work intensification.

This demonstrates a further facet to how workplace learning might be viewed and how the views and actions of managers can influence the culture relating to learning within the organisation. This links to the earlier discussion on Billett's affordances and how individuals engage with activities or otherwise.

Organisations will have preferences regarding what skills their employees require and whether they require them to have 'competence' and/or 'capability' within their particular work area. What is seen as valuable in terms of competence or capability will affect the perceptions of effectiveness held by both the employing organisation and the workplace learning participants themselves. This has relevance to how workplace learning programmes are designed and where the expectations of organisations commissioning workplace learning programmes are located. How the combination of competence and capability work together was first considered by psychologist David McClelland in 1973 and has been developed by many authors since,

including Berman Brown and McCartney (2003). Explaining the relationship and differences between these two concepts they note that 'competence is ... focused on the performance of pre-defined tasks and based on the past ... Capability is ... broadly focused on the performance of non-defined tasks and cannot be demonstrated in the present, because it exists as potential/future possibility or capacity' (Berman Brown and McCartney, 2003, p. 7).

Woodruffe explores the tension between the two concepts noting that

An essential distinction [between competence and competency] is between aspects of the job at which the person is competent, and aspects of the person which enable him or her to be competent. Competencies deal with the behaviours people need to display in order to do the job effectively (e.g. sensitivity) and not with the job itself (e.g. staff management).

(Woodruffe, 1993, p. 30)

Doncaster and Lester (2002) indicate that on a practical level, capability should be about possessing such qualities as being able to recognise the need for and implementing change, being able to take the lead and being able to share learning with others. These ideas around competence and capability are relevant to an organisation's workplace learning objectives. For example, some public sector organisations have a responsibility to ensure the safety of the public. This usually means workers following set protocols in what are often emergency situations, even though they may perceive better outcomes from following a different course of action. Potentially organisations want workers to be both

competent and capable, depending on the particular work task or role they are undertaking at any given time. Also, capability might be more akin to more senior roles within organisations, where having to act swiftly without preparation or having to problem solve might be a daily occurrence. Jobs where the worker's role is to deal directly with customers may require lower levels of capability, and the need for competence might be stronger as long as the worker is able to call upon more senior colleagues should they encounter a situation for which there is no set protocol. This might lead one to suggest that a worker's capability is generated through sustained engagement in a work role where a worker's experience over a period of time enables them to increase their capability.

The literature on organisational practices and culture is important because it explains how perceptions regarding the effectiveness of workplace learning are formed and the various factors which might impact on this. The literature can be used to help analyse the data collected and identify different organisational practices which either support or restrict effective workplace learning.

2.7 Conceptual framework

Although the elements of the conceptual framework have been discussed throughout this chapter, a summary is offered in the table below.

Table 2 – Conceptual Framework

Conceptual framework		
Area	Relevant concepts	How this relates to/is used in the research
Definitions and context of workplace learning	<ul style="list-style-type: none"> • Leitch Report, HEFCE, QAA, UKCES, Selfe • Harris, Boud et al., Reeve and Gallagher, Caldwell, HEA Demonstrator Projects 	<ul style="list-style-type: none"> • Scene setting and contextualisation of subject • Definition and data analysis (how organisations define WPL)
Theories relating to how learning occurs	<ul style="list-style-type: none"> • Brennan and Little • Sfard – learning through acquisition • Learning through participation <p>Situated learning, communities of practice (Lave and Wenger)</p>	<ul style="list-style-type: none"> • How workplace learning is described by the organisation • How organisations organise learning, which types of learning and philosophy underpin workplace learning programmes
The way organisations enable workplace learning	<ul style="list-style-type: none"> • Expansive/restrictive framework – Unwin and Fuller • Billett – Affordances 	<ul style="list-style-type: none"> • How expansive/restrictive organisations are towards workplace learning programmes • Used to explore interaction of individual agency or motivation and organisation's support for learning

Informal or non-scheduled learning	<ul style="list-style-type: none"> • Eraut • Kohl 	<ul style="list-style-type: none"> • Used to formulate research questions and subsequent interview questions to ensure they encompass informal learning • Used to analyse data on how organisations support additional learning provided by the organisation or to reinforce workplace learning
Individual agency	<ul style="list-style-type: none"> • Individual agency – Billett • Autonomy • Lifecourse – Bimrose and Brown • Billett, Eraut 	<ul style="list-style-type: none"> • Used to make sense of data relating to individual agency and related issues for example learning through the lifecourse and autonomy
Organisational culture and impact of this on the effectiveness of workplace learning	<ul style="list-style-type: none"> • Bishop • Schein – Organisational culture/types • Organisational competence and capability – Berman Brown and McCartney 	<ul style="list-style-type: none"> • Used to analyse data collected regarding the organisations • Different organisational practices • Links to Billett and expansive and restrictive framework • Used to explore data collected and position organisation's perceptions

2.8 Research questions emerging from the literature review

After examining the relevant literature, policy and findings from the initial study, the following research questions have been developed:

1 In what ways is workplace learning perceived as effective or not effective by employees?

This question relates to the ways in which participants undertaking the workplace learning programme and managers/commissioners of the programme describe effectiveness and non-effectiveness. It invites research participants to describe indicators which evidence the effectiveness or otherwise of workplace learning programmes. This relates to the literature concerning the purpose of workplace learning and whether effectiveness relates to the development of individuals or the organisation. It also relates to individual requirements and preferences and learning through the lifecourse (Bimrose and Brown).

2 What are the features of organisations which impact on this perception of effectiveness and non-effectiveness?

This question relates to how features of organisations that have employees undertaking workplace learning programmes impact on how participants and commissioners of the programme perceive the effectiveness or non-effectiveness of the programme. This relates to Unwin and Fuller's expansive/restrictive framework, Billett's affordances, and how unplanned, informal and (some aspects of) planned learning is supported (Eraut).

3 What organisational practices might influence the effectiveness of workplace learning?

This question relates to how organisations support workplace learning, both formally/procedurally and informally. This includes the manager's role and how

workplace learning is positioned within the organisation, that is, autonomy, shared learning and individual agency.

2.9 Conclusion

This chapter has explored the literature associated with the research project and the complexity and multifaceted approach to workplace learning required to consider both organisational and individual aspects that shed light on how to assess the effectiveness of workplace learning programmes. Five categories of literature were identified beginning with the multiplicity of definitions relating to workplace learning and the complexity of citing a universal definition. Next, the work of Sfard was looked at in order to explore how learning occurs. Situated learning was then considered with a discussion around communities of practice.

How organisations enable workplace learning was then considered, which related to the work of Unwin and Fuller, and Billett. This was followed by a discussion about informal/non-scheduled workplace learning, drawing on the work of Eraut and Kohl. The work of Bishop et al. was then looked at in relation to organisational culture and its impact on workplace learning was explored. Tools used to extract learning from work such as Action Learning Sets and Kolb's cycle of learning were also discussed as well as the theory of learning organisations.

The literature described above contributes to the conceptual framework which underpins the research and has been used to formulate the research questions, the formation of the interview schedules and the process of data analysis. This will be revisited in later chapters.

The literature has also indicated a need to consider the different outcomes for workplace learning and whether stakeholders perceive this in terms of individual or organisational development. Additionally, the way in which organisations support workplace learning (or otherwise), drawing on the work of Unwin and Fuller, and Billett, is a key priority for workplace learning research. Informal learning, particularly in the form of activities such as reflection or Action Learning Sets is a key aspect of workplace learning and requires consideration when exploring perceptions of effectiveness. Finally, the literature review highlighted the importance of the impact of individual agency on perceptions of effectiveness and how learning requirements differ throughout the lifecourse.

The next chapter will consider the methodological approach that was used in the research project. The qualitative nature of the research, which used a social constructionist approach, will also be discussed as well as the associated methods that were employed.

3 Methodology

3.1 Introduction

This chapter will examine the methodological approaches linked to the research project. The methodology which influenced the project will be considered, a qualitative approach being cited as the predominant influence, and some of the debates which surround this approach will be explored. Views around knowledge creation will be looked at and the social constructionist approach that was adopted will be explained. The research method employed to explore the research questions will be discussed and will include an explanation and justification for the use of the case study approach which was used within the two participating organisations. The use of semi-structured interviews will also be explained. Validity and ethics will be explored and the chapter will conclude with a discussion concerning the role/impact of the researcher and insider/outsider debates.

3.2 Methodological approach

My stance as a researcher takes a 'naturalistic approach', that is, that 'the social world can be understood only from the standpoint of the individuals who are part of the ongoing action being investigated' (Cohen et al., 2007, p. 19). I am mindful that I am reliant on the perceptions of the participants. I do not consider individual perspectives to be a claim to truth in an objective sense, rather an expression of an individual's views on a particular subject, in this case, workplace learning.

3.3 Qualitative/Quantitative debates

The research project undertaken was qualitative in nature, an approach which can be identified as having 'a focus on natural settings, an interest in meanings, perspectives and understandings, an emphasis on process and inductive analysis and grounded theory' (The Open University, 2001, p. 49). The focus of the research project was to 'understand peoples' outlooks and experiences ... look at the work from their viewpoint ... try to capture the meanings that permeate the culture as understood by the participants' (The Open University, 2001, p. 53). Yates suggests that 'qualitative data consists of things that we find in the world which holds meaning for ourselves or for others' (2004, p. 138), a view that resonates with the research questions, which are concerned with the participants' perceptions of workplace learning.

Dey (in Yates, 2004, p. 150) notes that qualitative research involves a variety of methods including in-depth, structured or semi-structured interviews, participant observation, fieldwork, focus groups, direct observation and analysing material which provides information regarding the lives and behaviour of the people being studied (texts). The research aims to provide accounts about peoples' lives and is often presented as 'richer' and 'more valid' than quantitative data.

The aim of the research study was to ascertain, by using semi-structured interviews, the perceptions of participants regarding the effectiveness of

workplace learning and how their employing organisation with its norms and practices impacted on this. I believe that using a qualitative approach enabled me to gain rich data regarding this, data which would have been difficult to gather using a quantitative approach. Quantitative research, with its use of 'standardised research instruments', 'search for causal relationships' and 'statistical analysis' (The Open University, 2001, p. 77) would not be suitable to fully address the research questions identified due to the multiple perspectives of the participants and the subjective nature regarding the meaning of learning and what is perceived as making it effective. The research questions (see pages 24–25 and 76–77 of this thesis) focus on the perceptions of participants rather than measurable data.

However, it is important to note that contemporary definitions of qualitative research are problematic, as Rolfe notes: '[A]ny attempt to establish a consensus on quality criteria for qualitative research is unlikely to succeed for the simple reason that there is no unified body of theory, methodology or method that can collectively be described as qualitative research' (2006, p. 305). Rolfe is suggesting here that qualitative research as a form of research is therefore a contested subject and difficult to define both as a method and in terms of its underpinning theories and philosophies.

A positivist approach to the research was not appropriate due to its roots within positivism, which Scott and Usher (2011, p. 12) describe as

an epistemological position that affirms the facticity of the world. It argues that, since the only possible content of true statements is facts, it is scientific method that reveals facts about the world. Scientific method is the set of rules that guarantee accurate representation; a correspondence between what reality is and how it is represented in knowledge.

The research questions identified are concerned with attitudes, perceptions and feelings, which would not be observable within a positivist sense and therefore this approach would not be able to glean the required data.

A further method that was considered is grounded theory (Glaser and Strauss, 1967). Costly and Armsby (2007, p. 134) explain that

Theory is grounded in specific observational data; patterns emerge from the data and are not imposed on it before it is gathered. Observers should have no prior theoretical preconceptions and create and revise theory as the data are collected. It is the specific or individualised context of the organisation that contributes to the development of theory.

Methods used within this approach include qualitative data such as observation and interviews. Costly and Armsby further suggest that grounded theory 'seems ideal for use with practitioner researchers who must cope with the constraints and advantages of the real world' (2007, p.134).

However, this method has been subject to much critique, often attributed to the separation of its two creators and their subsequent (individual) interpretations of the method (Goulding, 2002), an issue which can arise with any researcher and their interpretation of the method used. Charmaz suggests that much of the criticism arises because of the terms used in grounded theory, which can also be related more commonly to quantitative research (Charmaz, 1983). At the time when this theory was introduced, qualitative research was not seen as a rigorous enough method and therefore grounded theory drew on the language of quantitative rather than qualitative research. This focus of the language of the latter can alienate the qualitative researcher, who may feel at odds with this. Furthermore, grounded theory attempts to construct a process of 'value free' theory, building up from the ground. However, the extent to which this can be achieved is questionable as researchers and participants are not value free and therefore data collected will reflect this. The researcher's own experience, learning, philosophy, culture and values will impact on the way ideas or research questions are formed, how participants are interacted with and how data is interpreted and themes generated. I was mindful of this when undertaking research activities; however, I acknowledge that to be value free is not an achievable concept.

Within educational research there has been a move towards using multiple methodologies rather than focusing on using either qualitative or quantitative methods, or focusing on particular disciplines or methodological traditions. As

Molina Azorin and Cameron suggest, 'mixed methods research (the combined use of quantitative and qualitative methods in the same study) is becoming an increasingly popular approach in the discipline fields of sociology, psychology, education and health sciences' (2010, p. 95) . However, there are some disadvantages to this approach, as Creswell and Plano Clark recognise. For them mixed methods can be quite difficult to undertake, are challenging because they are seen as requiring more work, take more time and use more financial resources (Creswell and Plano Clark, 2010. In terms of the research I am undertaking, using additional quantitative methods would not help to address the identified research questions due to the desire to glean perceptions and feelings rather than any quantitative data.

It is important to note that although a quantitative approach and the subsequent data it would produce would be useful, the data gleaned in the organisations that I sampled did not seem to suggest it as the preferred measurement. I therefore concluded that a qualitative approach employing the case study method was most suitable in order to produce the required data within the resources available.

3.4 Constructivism

I take a constructionist epistemological approach to knowledge. For me 'knowledge is constructed, not simply discovered ... is multiple rather than singular and ... is a way in which power can be exercised (Stainton-Rogers,

2006, p. 80). Constructionists acknowledge that the material world exists but believe that to view knowledge as being discovered is simplistic. Even in the case of scientific investigation, knowledge that is discovered is 'one' representation of the real world but it is one that has been influenced by the scientists involved, that is, in what might appear to be the objective processes of scientific discovery there are decisions that have influenced the nature of the knowledge that is developed. This is referred to as 'human meaning making' (Stainton-Rogers, 2006, p. 81). For constructionists knowledge is inextricably linked to power; those with knowledge can claim power over certain situations and schools of knowledge. For example, Friedson (1986) suggests that doctors are seen as the creators of medical knowledge so have the power to define what is described as illness or not and therefore whether a person is locked up for being a criminal or given treatment for being ill. Thus constructionists believe that because scientists and researchers who discover knowledge are human, knowledge will be influenced by those who discover it; consequently it must be constructed. This indicates that research should aim to make the active role of those involved (researcher and participants) in the research process apparent, a theme that will be developed later in this chapter.

3.5 Case study approach

Punch (2005, p. 144) suggests that

[the idea behind case studies] is that one case (or perhaps a small number of cases) will be studied in detail, using whatever methods seem appropriate.

While there may be a variety of specific purposes and research questions, the general objective is to develop as full an understanding of that case as possible.

Examples of case studies can include 'an individual ... a group such as a family or class, or an office ... it can be an institution – such as a children's home, or a factory' (Gillham, 2000, p. 1).

Cohen et al. (2007) offer a further dimension, that is, that case studies are a style of educational research and can be defined by a number of features including temporal characteristics which help to define their nature, boundaries and parameters (both physical and social). They go on to suggest that case studies can be defined by an individual in a particular context, at a point in time or by the characteristics of the group and may be defined by role or function and by organisational or institutional arrangements (Cohen et al., 2007, p. 254). This explanation of case studies sits closely to the research undertaken in that the research intentions were to gain the perceptions of a specific group of people who were currently undertaking a workplace learning programme or who had responsibility for organising/commissioning the programme. Therefore, participants were situated in a particular time and place and were undertaking a particular role, albeit at different stages of their careers and with differing levels of experience, themes which will be explored further in Chapters 5 and 6. Hitchcock and Hughes suggest that 'case studies are distinguished less by the methodologies that they employ than by the subject/objects of their inquiry'

(1995, p. 316). They go on to say that case studies have a number of different features: a concern with a vivid description of events, a focus on individual actors or groups of actors whose perceptions of occurrences they seek to understand, and an attempt is made to represent the views of participants by creating a report (Hitchcock and Hughes, 1995). This description links to a social constructivist approach where there is a desire to create understanding of the wider context and not just an individual perception or view.

It is clear from the above, therefore, that a consensus definition of case studies is problematic and there are differing views regarding their function, how useful they are and how they are utilised.

Yin has written extensively on the use of case studies (2003a, 2003b, 2004) and although an advocate of their use he suggests some caution, stating that:

The case study has long been (and continues to be) stereotyped as a weak sibling among social science research methods. Investigators who do case studies are regarded as having downgraded their academic disciplines. Case studies have similarly been denigrated as having insufficient precision (i.e. quantification), objectivity or rigor.

(Yin, 2003a, p. xiii)

Yin further suggests that 'case studies are the preferred strategy when "how" or "why" questions are being posed, when the investigator has little control over events, and when the focus is on a contemporary phenomenon within some real-

life context' (Yin, 2003a, p. 1). Yin is highlighting here how case studies can be seen as much more than an approach for collecting data and can be used as a strategy for the research itself. He identifies three different types of case study:

- 1 an exploratory case study which is aimed at defining the questions and hypothesis
- 2 a descriptive case study which describes a particular situation or state of affair in a particular context
- 3 an explanatory case study which 'presents data bearing on cause–effect relationships – explaining which causes produced which effects' (Yin, 2004, p. 5).

I would suggest that the case studies used in the research project do not match any of Yin's types; nevertheless, characteristics such as describing a particular affair do resonate with the research so would be most aligned to Yin's descriptive case study. However, I did not use a descriptive case study and relied more on the perceptions of individuals to address the research questions. Detailed analysis of the organisations used as case studies was not a focus of the research and therefore not undertaken.

Stake (2005) suggests that there are five key requirements for a case study: issue choice, triangulation, experiential knowledge, contexts and activities. He states that the 'case study optimizes understanding by pursuing scholarly research questions ... For a qualitative research community, case study concentrates on experiential knowledge of the case and close attention to the

influence of its social, political and other contexts' (Stake, 2005, pp. 443–4).

Stake (2005, p. 445), like Yin, defines three types of case study:

- 1 intrinsic – to gain a better understanding of a particular case
- 2 instrumental – to provide insight into an issue
- 3 multiple or collective – where a number of cases may be studied jointly in order to investigate a particular area.

Stake's work influenced the approach I took as I wanted to gain a better understanding of perceptions of effectiveness with regard to workplace learning across two different case studies (public sector and commercial).

Disadvantages that can be attributed to the case study approach include the inability to generalise or transfer the findings to other situations and potential researcher bias (Nisbet and Watt, 1984). Shaughnessy et al. (2003) suggest that case studies can lack a degree of control, making it difficult to make cause and effect conclusions.

However, Flyvbjerg (2004, p. 391) points out a number of 'misunderstandings' in relation to case studies which are often used to provide a negative critique:

- 1 General, theoretical knowledge is more valuable than concrete, practical knowledge.
- 2 One cannot generalize on the basis of an individual case.
- 3 The case study is most useful for generating hypotheses.

- 4 The case study contains a bias towards verification.
- 5 It is often difficult to summarize and develop general propositions and theories on the basis of specific case studies.

He suggests that these misunderstandings can be explained and counteracted in a number of ways including in relation to point 4 above, that 'all research includes a bias and therefore this is a criticism which cannot be levied exclusively at case study research' (Flyvbjerg, 2004, p. 391).

An alternative to using case studies would have been to interview a range of learners across different workplace learning cohorts or programmes and across differing work settings. However, this may not have enabled me to adequately address the research questions, which were focused on how the practices of the employing organisations of participants impacted on perceptions of effectiveness. Interviewing participants across several organisations may not have effectively gleaned this data and it may have also been difficult to identify themes with so many variables (different organisations) being present.

Case studies, therefore, were used in the research because it would have been difficult, following a consideration of alternative methods and approaches as discussed above, to address the research questions without them. They have enabled me to gain data which not only provides rich descriptions of particular cases but also highlights the different perceptions of the participants with regard to workplace learning and the particular workplace learning programme being

undertaken at a particular time and in a particular context. Using a case study approach enabled me to explore these different contexts and perceptions of effectiveness and what organisational factors impacted on them.

3.6 Choice of methods

Semi-structured interviews were used as I believed these were the most appropriate method to gain the data required to address the research questions. This is aligned to the naturalistic approach I follow and also reflects my understanding of knowledge as being socially constructed.

Yates defines semi-structured interviews as 'a pre-set agenda ... used to define the flow of the interview ... they are focused on getting a rich and detailed account of the subjects' understandings, feelings, knowledge, etc. on the research topic' (2004, p. 156). The advantage of using interviews is that following initial identification of participants, the risk of a poor response rate is low compared to other research methods such as questionnaires. The process of obtaining interviews will be discussed in greater depth in Chapter 4.

Given my aim to address the research questions in depth in particular settings, a larger sample would have been unmanageable. Crouch and McKenzie note that 'from a more empirical perspective, the labour-intensive nature of research focused on depth (including, sometimes "reflexivity") can be evoked to justify a

small sample size' (2009, p. 484). Therefore a smaller sample enabled me to gain relevant, in-depth data within the time available.

Interviews were conducted both face to face and over the telephone, at the choice of the participant. Telephone interviews are regarded as being less time-consuming than face-to-face interviews (Irvine, 2011) and I noted that face-to-face interviews across both case studies had a longer duration than telephone interviews. However, Sweet suggests that 'the quality and quantity of data [is] not noticeably different between face-to-face and telephone interviews' (2002, p. 63). The time element seemed to be a contributory factor as to why participants opted for telephone interviews, even though I had offered to visit them at their workplaces. However, on reflection I think that the face-to-face interviews gleaned richer data. I tended to ask more follow-up questions and participants tended to elaborate more in their responses to questions. Possible reasons for this include being able to respond better to non-verbal cues, allowing for natural pauses, where the participants may offer further detail, and I had a sense that the participants I interviewed face to face enjoyed the experience more and therefore said more.

The interactive nature of interviews means that responses can be clarified or probed and the data required can be collected instantly. The disadvantages of interviews, however, are that they can be time-consuming for participants as they require more time than it is likely to take to fill in a questionnaire. For the

researcher telephone and face-to-face interviews are time-consuming both in relation to administering the interviews and transcription. This could present a risk to the research project whereby the researcher is unable to complete a thorough analysis of the data in the time allocated (Cohen et al., 2007, pp. 359–82). However, I believe that I mitigated against this through good planning and the development of a research timetable, which I followed wherever possible, making minor amendments where required.

Other methods that I could have used included group interviews and focus groups. However, I understood from my contacts with the workplace learning providers that it was difficult across both case studies to get the participants together at the same time because of their work commitments and different geographical locations. I was aware also that the cohorts of learners encompassed a range of participants with different levels of experience and felt that group dynamics and individual confidence might impact negatively or give bias to the data collected. Observation would not have addressed the research questions as I would not have been able to ascertain perceptions from observing either learning sessions or workplace tasks being undertaken.

3.7 Ethics

My relationship with the organisations used as case studies is that I have had limited previous contact with them and have not worked within them delivering workplace learning. This was an important factor when I was identifying potential case studies. Both organisations were existing customers of the organisation I undertake work for and therefore the nature of the relationship could be defined as a partnership (see Chapter 2). For the proposed research project, ethical issues related to both individual workplace learning participants and the managers who had organised or commissioned the workplace learning programme, my interviews within each organisation and the maintenance of confidentiality between and within these organisations. Therefore, I produced clear statements for organisations and participants outlining what taking part in the project would involve and how information would be used in the final thesis (see Appendices 3 and 4).

The research project followed The British Educational Research Association guidelines with respect to consent, deception, debriefing, withdrawal, confidentiality and protection of participants (BERA, 2011). This included ensuring that the respondents were aware that the interviewer was an EdD student. As stated previously, my role did not include a high level of direct contact with learners (it did not involve marking learners' work) and therefore ethical conflicts were minimal. The research project received ethical clearance

from both the HEI delivering the HE WBL programme and The Open University (supervising the research). Participants were given a consent form explaining the research, how their contributions would be used and information regarding how to withdraw from the research project should they want to (see Appendix 5).

3.8 Validity and generalisation of the findings

According to Cohen et al., validity can be defined as 'the meaning that subjects give to data and inferences that are drawn from the data that are important' (2007, p. 134). Validity is crucial to both qualitative and quantitative research and can be defined in many ways. For qualitative research, validity might be addressed through the depth, honesty and scope of the data collected. It might include the extent of triangulation and the steps taken by the researcher to ensure objectivity (Winter, 2000).

In order to maintain validity I ensured consistency was maintained by making sure that the same questions were asked of each respondent within each organisation. I reviewed the research schedule after initial interviews had been completed within each organisation and made changes as required because I found that some questions had already been answered by participants in response to previous questions. Additionally, I felt that the sequence of questions could be improved to avoid participants feeling as if they were repeating themselves. I offered to send participants a transcript of their interview, which was typed up afterwards. Most participants declined this offer; however, those

who requested a transcript were emailed a copy and from those participants I received no communication regarding misquotes or misinterpretations.

In terms of generalisation of the findings from the research, the type of higher education workplace learning that was researched may be different from other forms of workplace learning, for example, NVQs, or for different participants such as apprentices; therefore some of the findings may be more applicable to some workplace learning providers and practitioners than others. For example, having a close relationship with the organisation and learners having a high level of support from their direct manager and organisation may not be a feature of other workplace learning programmes; thus the findings around this and associated recommendations may not be useful to other types of learning providers. This issue will be explored further in Chapter 7. This limit to generalisation is not surprising due to the wide array of learning and developmental activities that workplace learning can encompass, as outlined in Chapter 2. Although I hope that the findings will hold value for a range of stakeholders in workplace learning, individuals will need to decide for themselves just how useful and related the findings are to their specific workplace, practice or pedagogy.

3.9 The role/impact of the researcher and insider/outsider debates

A further issue, as highlighted previously, was the perception of my role by participants. I avoided presenting myself as being highly informed about

programmes and therefore as someone who had influence over their workplace learning programme as I knew this could affect their responses. The potential impact of the interviewer on participants' responses can also cause concerns about the objectivity of the data gained because the interviewer could introduce an element of interpretation. I self-monitored this to minimise the impact on the data.

As mentioned previously, the participants in the research were not known to me. I attempted to be as impartial as possible and had no direct input to the participants undertaking the programme. Bonner and Tolhurst (2002) suggest that researchers are either insiders or outsiders to their research domain. Breen explains this: 'Generally, insider researchers are those who chose to study a group to which they belong, while outsider researchers do not belong to the group under study (2007, p. 163).

Outsider researchers often receive criticism as their research activities can affect the lives of those they are researching. Drew referred to this type of researcher as being like 'a seagull', which she further elaborates on as being 'a researcher or consultant who flies into a community; craps all over everything then leaves the community to tidy up the mess' (2006, p. 40). Bonner and Tolhurst (2002) suggest three advantages and perhaps characteristics of an insider researcher: having an advanced understanding of the research group's culture; the ability to

interact easily with the group and its members; and a previously established intimacy with the group.

Using Bonner and Tolhurst's advantages/characteristics of an insider researcher, I would describe myself as an outsider to the organisational context of the research that was undertaken. However, my relationship to the formulation and development of the programme being undertaken (the learning context) was very close and therefore in this respect I have to describe myself to some extent as an insider. Because of this I made it clear to the participants what my relationship with the higher education provider was and currently is. Although I do not work for the higher education provider on a full-time basis, I may have potentially been seen to be in a position of power. This could be positive in that participants may feel that the interview is an opportunity to provide feedback and influence the programme for future participants and cohorts. However, this could have negative implications due to participants feeling reticent about being honest with me about the perceptions of the programme.

Although many researchers suggest that one can only be an inside or outside researcher, Breen (2007) called herself a researcher in the middle. Drawing on personal experiences, she developed a strong empathy with the participants she was undertaking the research with. She suggested that the insider/outsider paradigm was simplistic, and might relate more to epistemological research underpinnings, for example interpretive versus positivist, than to an individual

researcher's actual positioning. Breen (2007) inferred that a broader view might identify all researchers as insiders, as humans studying humans. I have some sympathy with this view and feel this resonates with my position as a researcher.

I recorded my reflections in a research journal and on reflection I do not think that my connections to the provider had an impact on the answers that the participants gave, although I acknowledge that this is my own perspective and participants may have expressed different views, if asked, with regard to this.

The research questions asked the participants to consider what they think and feel and therefore required them to consider their individual perceptions, which undoubtedly means that these will be influenced by a number of factors. I am mindful of the multiplicity of factors which may influence participants' involvement and responses during the research. As workplace learners, they may feel they are implicitly required to give responses which show the organisation in a positive manner. There could be fears that the interviews may not be truly confidential and participants may feel uncomfortable about presenting the organisation, colleagues or the learning provider in a particular way. Participants' responses could serve a particular agenda, for example participants who feel aggrieved with the organisation or workplace learning provider may give a negative impression without taking a balanced view. These potential issues were surfaced through analysis of my reflections, which I recorded in the research journal previously mentioned. I noted that some participants asked further questions about my links

to the workplace learning provider even though I had provided an explanation of my position and an information sheet. I assumed this meant that they required further clarity and reassurance about my role and how their responses would be used. I made a point of asking participants if they had any questions about the research prior to asking them questions. I also told them at the start of the interview that one of my closing questions would be to invite them to give feedback directly to the workplace learning provider, which demonstrated that the research was not controlled by the provider but by an independent research project.

3.10 Conclusion

This chapter has considered the methodological approach to the research project and the selection of a qualitative approach using a social constructionist focus. The case study approach was then explained and was followed by an exploration of my approach to the research, with semi-structured interviews being explained and justified. An explanation of the ethics related to the research was explained and ethical clearance arrangements stated. A consideration of the insider/outsider position of the researcher followed. Potential concerns highlighted related to time considerations in relation to undertaking interviews and the need to keep ethical good practice at the forefront of data collection.

The next chapter will consider how data was collected for the research project. It will explain the case studies used in more detail and explain the format of the

semi-structured interviews. Reflections will be offered on the process of data gathering and analysis of data will be explained.

4 Data Collection and the Process of Analysis

4.1 Introduction

This chapter will explore how the case studies used within the research project were chosen and approached. It will introduce the two organisations involved and explain the approach taken to data analysis. It will conclude with reflections from the researcher on the process of data collection.

4.2 Rationale for choosing the organisations

My rationale for selecting organisations to be involved in the research was as follows:

- A public and a commercial organisation: I wanted to include one public sector and one commercial organisation to explore workplace learning in different types of organisations with different cultures, features and practices. I was particularly interested in how these different organisations would support workplace learning and if providing an essential service did impact on the ability to access workplace learning and therefore, potentially, its effectiveness. I was also interested in finding out how commercial organisations might differ in this respect and how much currency organisations of this type gave to supporting workplace learning. I wanted to identify two organisations that had recently or were currently supporting a group of employees to undertake a higher education

workplace learning programme lasting at least nine months (as opposed to a shorter course which might make reflection on the experience more difficult). My expectation was that this would be a programme delivered within the workplace and tailored to meet the particular needs of the participating organisations, as data from the initial study and the literature review indicated that workplace learning can take many forms. This can include a programme of learning which focuses on the organisation and its particular requirements and more generic programmes where the content is fixed, for example NVQs.

- **Willingness to participate:** It was necessary to identify organisations that would be able to support the research by inviting employees to participate who would be available to undertake the interviews either face to face or over the telephone.

The case study approach, as explained in Chapter 3 has been considered in depth and I concluded that this was the most appropriate method to utilise.

4.3 Logistics

I approached two organisations that had worked with the higher education workplace learning provider that employed me. Participants in case study 1 were undertaking a leadership programme containing three higher education 20-credit modules. The learners were studying the final module of this programme when the interviews took place. Participants in case study 2 were undertaking a

foundation degree in leadership and were coming towards the end of the first year of two when interviews took place.

I emailed contacts identified by the university workplace learning programme facilitators who worked with the two organisations. Both contacts were involved in commissioning or supporting the workplace learning programme. I sent them an information sheet containing the details of what the research would entail. One organisation replied and agreed to the research, the other told the university workplace learning programme facilitator that was currently working with them that they would be happy to participate and this message was passed on to me.

The facilitator of the workplace learning programme on case study 1 was very supportive and helped me set up the interviews. Participants were given a choice whether to participate or not and several chose not to. Six of these took place over two separate dates and the facilitator released the participants from an Action Learning Set in order to be interviewed. The other three interviews I arranged myself with the participants directly; two of these were face to face and one was conducted over the telephone.

For case study 2, the facilitator (different to above) emailed all participants to tell them about the research and then I emailed them directly with information about the research and the consent form. I repeated this three times as the first and second email only gleaned a small number of willing participants. The organisational contact gave me the contact details for the learning and

development manager and the operational manager and I arranged both these interviews via email. I conducted the interview with the learning and development manager face to face and although I set up a telephone interview with the operations manager, unfortunately this didn't take place due to pressing work commitments. All interviews with participants for case study 2 were conducted over the phone at their request, probably because of the wide geographical spread of participants. Some participants commented on how they enjoyed the interviews and on one occasion encouraged colleagues to participate in the research project.

4.4 Case study 1

Case study 1 is a regional public sector organisation providing a wide range of services, including emergency and pastoral, to the local community. It employs approximately 2300 people.

Due to the male-dominated environment only one programme participant was female and unfortunately was unable to take part in the interviews. All participants interviewed therefore were male and they were all managers within the organisation at differing levels.

Most of the participants had been with the organisation for most of their working lives, rising through the ranks, having been given opportunities for personal and/or career development and some were nearing retirement age. There was a

range of experience of workplace learning prior to their current (when interviewed) programme of study. Some appeared to favour more academic qualifications such as masters degrees (off site) more than a workplace learning approach. Others were keen to express the usefulness of a workplace learning approach to both their personal development and the development of people who they managed.

The invitation to take part in research was extended to all 12 participants on the workplace learning programme. Interviews lasted an average of approximately 50 minutes and were recorded then transcribed. I conducted nine interviews within the organisation, eight with participants undertaking a level 4 higher education workplace learning programme and one with a manager who was both the person within the organisation who commissioned the programme and an operational manager. This individual also initially took part in the programme as a participant. It is important to highlight the potential conflict here as this person had a dual role. He did not attend much of the programme (I am not clear if he completed the programme) and we agreed that the interview would be focused around his role as the manager of the workplace learning programme. This shows the difficulties of defining clear constituencies between employers and employees; managers and workers; learners and supporters of learning.

Eight out of the nine interviews undertaken were conducted face to face in one of the organisation's buildings. In some cases this was the participant's office or

workplace, in others the interview took place at a regional office-type location. One interview took place over the phone.

The learning programme was facilitated by a representative of the higher education workplace learning provider who delivered workshops focused around module content, undertook one-to-one coaching sessions, provided self-study materials to support the module content, devised case studies with representatives from the organisation on current organisational issues and marked assignments.

4.5 Case study 2

Case study 2 is a multinational company employing approximately 160,000 people, offering a range of services which includes logistics and records management. I interviewed eight people from across the organisation, one of these was the learning and development manager and the rest were participants in a foundation degree (level 4/5 in England) programme focused on the area of leadership.

Most of the participants had joined the organisation at a lower rank and been given opportunities for personal and/or career development which had resulted in them climbing the career ladder within the organisation. Many expressed the organisation's commitment to 'home grown timber', stating how the organisation was very focused on offering opportunities for workers to develop. Most

participants did not have academic qualifications prior to commencing employment with the organisation and most expressed that this was their first higher education workplace learning programme.

I conducted eight interviews within the organisation, seven with participants and one with the learning and development manager. The learning and development manager had not been part of the commissioning process for the programme but had been involved since the programme commenced. It was clear from the interviews that this individual was very much involved in the programme and for organising/monitoring the support mechanisms that the organisation had put in place to assist participants.

The programme involved participation in workshops, using self-study materials, elearning and the use of organisational case studies. Those taking part were then expected to complete work-related assignments, which might include giving presentations. Participants were nearing the end of the first year of the programme when the interviews took place. The invitation to take part in research was extended to all 17 participants on the workplace learning programme. Interviews lasted an average of approximately 40–50 minutes and were recorded then transcribed. Unfortunately one of the interviews failed to record to a good standard so only minimal data was gleaned.

4.6 Process of analysis

The material which has been collected has produced a corpus of data including transcribed interview notes and some factual data relating to the participating organisations. With regard to the process of transcription, Roberts notes that 'as transcribers fix the fleeting moments of words as marks on the page, they call up the social roles and relations constituted in language and rely on their own social evaluations of speech in deciding how to write it' (1997, pp. 167–8). Therefore there is a need to be mindful of the way in which interview data is transcribed. My practice here was to record the interviews and when they had been transcribed, taking account of pauses or where clarification was needed, further expand the questions as required. The interviews were transcribed by an ex-colleague who had undertaken this type of work before and who I made aware of confidentiality issues. Once this was complete, I checked the transcriptions again against the recorded interviews to check for accuracy.

Taking an emergent view, I undertook some early analysis of the data as it was collected to see if major themes or issues emerged. I then undertook a preliminary analysis of the data including identifying common themes and making notes on transcripts, documents. Here I was looking for commonalities within language or definitions used, inconsistencies, and instances where the data collected conflicted. I underlined words and made notes to highlight particular responses or commonalities. I then went through the transcripts again and used

a selection of pens to highlight similar themes, which were often spread over a number of questions. I also did some initial analysis on the transcripts of interviews online by using highlighting and comments boxes.

This enabled me to begin to understand the data and to ascertain if further questions needed to be asked (I did ask participant 9, the manager on case study 1, additional questions following this analysis). Preliminary analysis also enabled me to review the interview schedule and make subtle amendments accordingly when conducting the interviews with case study 2. As the interviews progressed, I didn't ask questions where I felt that the content had already been covered but rather either skipped the question or just asked the participant if they had anything further they wanted to add.

I also noted upon reflection that the sequence of my questions could be better so I adapted the order in which they were asked in order to make them more logical for the participants. There were questions where I felt I needed to change the wording slightly to ensure that the meaning to the participant was what I had intended and also devised examples (which I used consistently) to explain what information I was seeking from the question. An example of this is where I asked participants if they saw any particular benefits of participating in a workplace learning programme. I noticed that participants tended to focus on benefits which were fairly generic to qualification-based learning programmes such as gaining a qualification. Although this is useful data and relevant to the research questions,

I needed to qualify this further and therefore added a sub-question after the original one which asked them to consider if they saw particular benefits of participating in workplace learning compared to more traditional forms of learning.

Once preliminary analysis had taken place, I undertook category and concept foundation, whereby there was a need to 'identify the major categories, which in turn may fall into groups. The data [could] then be marshalled behind these' (The Open University, 2001, p. 72). The categories used were created around the data that had been collected and what seemed like 'logical' groupings. This can be tested by 'whether most of the material can be accommodated within one of the categories and, as far as possible, within one category alone' (The Open University, 2001, p. 72). The conceptual framework, which was built up from a continuous review of the increasing literature, data collected from the initial study, and my emerging themes have influenced the categories used to analyse the data.

Following this analysis of the data, I began to form judgements about what I found out and generate explanations. This involved, firstly, seeking to understand the perceptions and intentions of participants and then looking at incidence. Finally, indications of meanings have been developed which have provided an insight into particular learners' and employers' views of what makes workplace

learning effective. However, such a small sample will not be robust enough to generate theories.

Comparative analysis can take place where 'instances are compared across a range of situations, over a period of time, among a number of people and through a variety of methods' (The Open University, 2001, p. 75). Some comparative analysis took place between the two case studies, but this was not the main focus of data analysis as the emphasis was on generating a range of factors and organisational practices that influenced perceptions of effectiveness.

This method of analysis links with the naturalistic stance of the research and enabled me to focus on 'the meanings that objects and actions have for participants' (Yates, 2004, pp.136–7), that is, how they perceive workplace learning and factors which impact on its effectiveness and use them as meaning makers in order to address the research questions.

I present the data in terms of the major themes that emerged – time and the synergy between programmes, organisation, and learners – drawing across both case studies looking for points of similarity and divergence. For example, looking at each case study as a whole has enabled me to develop a better picture of culture and practices and I have used this to consider the influence on what effective workplace learning means for the research participants.

A copy of a transcript showing initial analysis in progress is included in Appendix 7.

4.7 Validity

I am not expecting to be able to produce theories from the data but rather I am seeking to understand how the research questions are responded to by the participants and organisations concerned. I anticipated that the data collected would offer insights into what factors are significant in these particular organisational contexts.

A further issue, as highlighted previously, is the perception of my role by participants and their being clear about my knowledge of the programmes that they were undertaking as this might have affected their responses. I ensured that each participant was provided with an explanation of my connection with the higher education learning provider.

4.8 Reflections

I enjoyed interviewing the participants and much preferred face-to-face interviews to those on the telephone. Face-to-face interviews also tended to last longer, whereas the telephone interviews were more question-based and it was harder to establish a rapport and respond to non-verbal cues/communication. I felt that within the face-to-face interviews people opened up more and told me anecdotes or stories to back up the points they were making. I felt that the relationship of

trust between us grew more quickly than with the telephone interviews. In research on telephone interviews, Irvine (2011) also found that they were generally shorter than those conducted face to face. Reasons for this included the greater amount and nature of small talk that occurred when being greeted and invited into a private home or workplace to conduct a face-to-face interview compared to when opening an interview by telephone. She also noted that the rapport-building exercises, such as offering a drink or asking about the participant's journey, that commonly preceded face-to-face interviews were replaced by less detailed courtesies and there was a tendency to 'get down to business' much more quickly' (Irvine, 2011, p. 211).

I collected the data by recording the interviews. This proved more difficult over the phone due to the sound quality and connection problems. On a couple of occasions the phone connection failed and I had to ring the participant again, which may have affected the 'flow' of the interview.

I feel I have become more confident in interviewing since undertaking the interviews on the initial study. Having had some problems with recording an interview during the initial study, I became cautious and used two recorders. I also realised the importance of rapport-building and how one has to try much harder to establish this during telephone interviews as opposed to face-to-face ones.

Two of the participants asked for a list of the questions I was going to ask prior to their interviews. When I conducted these interviews, the participants had written notes (answers) to the questions and these were read out during the interview. Although I appreciate the participants wished to do this, I felt that this approach prevented a real conversation taking place, that the interviews were shorter and felt a little stilted. I did not ask these participants to explain why they wanted to see the questions beforehand; it was their right to request this information if they chose to do so.

4.9 Conclusion

This chapter has explored how data was collected for the research project. It has considered the rationale for choosing the two case studies and explained the organisations that the case studies derive from. It outlined the data gathering process and also how data was analysed. It concluded with reflections from the researcher on the process of data collection. The next chapter will consider the theme of time, incorporating findings from both case studies.

5 Main Findings/Theme - Time

5.1 Introduction

Two major themes, 'time' and the 'synergy between programme, organisation and learners', were identified following an analysis of the data. The following two chapters explore these themes in detail.

Due to the sheer amount of transcribed notes (approximately 80,000 words) it would not be possible to include all of the data. I have, therefore, chosen to present data which relates to each theme, and the related sub-themes, which best illustrates how the analysis helped me to investigate the research questions.

Chapter 5 deals with the theme of 'time' and the four sub-themes that emerged from the data which added depth to my understanding of the impact of time on perceptions of the effectiveness of workplace learning. The four sub-themes were:

- 1 Demands of workplace learning and time.
- 2 Autonomy.
- 3 Personal circumstances.
- 4 Views of 'time management'.

Chapter 6 deals with the synergy between programme, organisation and learners with four sub themes emerging from the data as follows:

- 1 Organisational strategy, which has two parts:
 - (a) organisational goals, aims and strategy regarding the workplace learning programme
 - (b) organisational decision to use a workplace learning process.
- 2 Learning in the social context of work, which has three facets:
 - (a) managers supporting managers
 - (b) shared learning
 - (c) implementing learning.
- 3 Participants' position in the lifecourse.
- 4 Measures of success.

The sub-themes across both themes are necessarily closely related, with sub-themes impacting on each other; therefore there is some crossover between them.

5.2 Recap on the case studies

Case study 1 is a regional public sector organisation providing a wide range of services, emergency and pastoral, to the local community. It employs approximately 2300 people. All nine participants (managers undertaking a workplace learning programme and the manager responsible for commissioning the programme) were male (see Chapter 4).

Case study 2 is a multinational company employing approximately 160,000 people and offering a range of logistic services. All but one of the interviews was

conducted over the telephone at the participant's request. Only one of the eight participants was female and all were managers, one of these being the learning and development manager who was involved in supporting the programme.

5.3 Demands of workplace learning and time

The strongest theme which came out of the analysis of data from both case studies related to lack of time and the particular demands of workplace learning. Participants' responses indicated that these difficulties focused around four key areas: time to attend workshops; time to undertake workplace learning programme activities like reading; time to undertake assignments and do them justice; and time to assimilate learning back into the workplace. It was clear that time, and how individual participants experienced this in relation to their participation in the workplace learning programme, had a big impact on their perceptions of the programme, their effectiveness on it and the success they could achieve from it.

In contrast to the common assumption by organisations that locating the programme in the workplace may reduce the time input required by participants or the time away from their work role, it appears that locating the programme wholly in the workplace did not necessarily reduce time pressures. Two participants from case study 1 commented that if the learning programme had been away from the workplace, the workload might have been easier to manage. One stated that: *'If we had gone off today and done it at X College ... or*

somewhere like that it would have been a lot easier. That would have made no difference to the organisation at all ... we cover ourselves anyway so that wouldn't have been an issue but we're not, we're here [at the workplace] and that causes issues with regard to people coming in all the time ...' [this participant is talking about how participants on the programme have to attend to workplace duties meaning that they sometimes have to leave the workplace learning programme workshops]. A consideration here is how the workplace as a site for learning can place more pressure on the learners undertaking the programme rather than more traditional learning programmes based in a location away from the workplace.

Participants stated difficulties in finding the time to undertake the learning activities and in addition to this there was the time needed to get the maximum benefit from the programme: however, there were differences regarding how individuals experienced this. Participant 5 on case study 1 stated: *'They make it hard by not freeing up capacity, obviously now financial issues are going to come to bear, that is, everything that isn't core business is going to be looked at.'* This is interesting in two ways: firstly, that there is a perception of a not yet existing 'threat' of withdrawal due to changes within the organisation, and this perceived 'threat' already appeared to impact on the participant's experiences of workplace learning; and secondly, that their own development is not seen by this participant as core business, making them wary of assigning the time they need to participate in the programme activities.

Participants, particularly on case study 1, ventured that learning in the workplace placed potentially more demands on learners than more traditional courses they had experience or knowledge of. This appears to be due to the ongoing nature of the programme in contrast to shorter training courses, that the learning sessions take place in the organisation's premises, and the perception by participants that the organisation expects tangible changes/outcomes (which may not be explicitly measured or demonstrated following attendance on shorter courses). Participant 4 on case study 1 pointed out that more traditional development programmes might be easier to manage, noting that: *'A taught programme is a little slicker, more succinct and to the point, there's your objective, have your short course and you've now ticked that box.'* This may also indicate that some participants might prefer a more input-based approach to learning. Other participants noted that they did not have any previous learning to compare with the current workplace learning programme, for example participant 7 on case study 2 suggested: *'The only drawback is that you've still got your day job to do and obviously you've got to fit this in and there's a fair amount of work involved. I think it is difficult because I have never gone through higher education ... before so I don't really know what the comparison is.'*

For participants in case study 1, there was a sense that as a public sector organisation the needs of the public would always come first and therefore would understandably be prioritised higher than workplace learning activities. For

participants from case study 2, meeting customers' requirements was seen as being a higher priority than workplace learning, as many felt that they would be measured by their organisation primarily on how well they met their work-related objectives.

Therefore, both organisations appeared, unsurprisingly, to encourage prioritisation of work-related tasks above workplace learning activities. This is not uncommon, from the perspective of both the learner and their manager, particularly in relation to unplanned and informal learning. As Eraut and Hirsh note, 'workload also affects whether people have time at work to discuss issues and to support others. Lack of time always comes high on the list of factors which hinder learning at work' (2007, p. 81). The process of managing time will be explored later in Section 5.6 of this chapter.

It appeared that the other people within the organisation were aware of the potential difficulties that workplace learners faced in finding time to engage fully with the workplace learning programme. The learning and development manager from case study 2, who was not part of the participant managers' hierarchy and therefore not able to directly manage time for participants, highlighted the challenge '*between their day job and doing or embedding ... the learning that they've taken away ... they're always itching to try it, to embed it, to see if it works but again sometimes its finding that balance...*'. This potentially indicates a separation between the learning derived from engagement with the workplace

learning programme and work activities (a point that I will return to in Chapter 6). Learners may see time spent learning, and on its subsequent implementation or assimilation, as 'additional' rather than being part of their core work role and responsibilities.

It is important to note that individual participants appeared to experience the issue of time differently to their colleagues, with factors such as particular job role, sense of autonomy, family situation and support from their manager impacting on this sense of time pressure. As participant 3 on case study 2 stated: *'You've got to be careful that your main business role doesn't get in the way of it ... there are times sometimes when you have to say to your boss look I need an afternoon to work away from my normal job...'* .

This is interesting in two respects. Firstly, perhaps the workplace learning programme could have been more aligned to work and therefore not seen as separate but rather more integrated into, or reflective of, current work practices. Assessments may then have been seen as requiring reflection on workplace tasks, linking theory to practice, and therefore identifying ways of improving performance rather than being seen as something that is done to fulfil the academic requirements of the workplace learning programme. Secondly, that this perception arose in both cases, but the very different work contexts influenced how it played out in practice. As the organisation in case study 1 provides an emergency service, work tasks will, understandably, be prioritised over

workplace learning and this can affect participation. As a government-funded agency, participants noted a strong commitment to the public. In emergency situations, clearly workplace learning has to take a lower priority but this might impact on the effectiveness of the programme. However, continually de-prioritising learning might have a detrimental impact on long-term improvements to the service being made where the programme was being used as a catalyst. However, as was discussed in Chapter 2 with reference to Munro and Rainbird (2000), working in an essential service does not necessarily reduce the quality and amount of learning within the workplace. Their research within two NHS community units noted that even in essential services, learning opportunities can be fostered if the manager has a proactive stance towards encouraging learning in the workplace. Management behaviours included giving high value to learning and development, workers sharing their learning with other members of the team and ensuring workers were given time to participate in learning opportunities. Therefore, the extent to which a worker/learner is able to participate in workplace learning may be more dependent on their manager than on the work undertaken. Munro and Rainbird's research, however, focused on non-managers. All the participants undertaking learning in this research study were managers and therefore will have had a much greater responsibility for prioritising (or not) workplace learning activities. Additionally, managing an emergency service might mean that managers who are committed to their learning are constantly, due to the nature of the work and unplanned priorities, rescheduling and prioritising time for self-development.

Participants from case study 2 expressed different but similar issues in that business priorities could mean that time to participate in workplace learning was deprioritised.

Pressure to succeed on the programme was expressed by participants on case study 2; however, this was not necessarily, according to participants, explicitly articulated by their organisation. It may be that to fail in the workplace learning programme could be perceived as failing publicly in their role as managers.

Participants from case study 1, though fully engaged with the workplace learning programme, did not express feelings of pressure to succeed to the same degree as those from case study 2.

Participants across both case studies identified features which suggested that the organisation offered an expansive learning context as defined within Fuller and Unwin's expansive/restrictive framework. Examples of these features included 'access to knowledge based courses and a structure for progression' (Fuller and Unwin, 2004, p. 142). However, participants continually emphasised the issue of limited time, with workplace learning activities often being prioritised lower than many other work-related and sometimes personal activities, as previously explored. Additionally, work-based learning impacted on their regular work tasks and participants reported that the additional work associated with the programme created more pressure for them at work, despite the benefits of participation. In spite of the presence of 'expansive features' within the

workplace, the overall perception of the participants was that being involved in these workplace learning programmes placed additional pressures on them.

Some participants expressed that more time would have increased the effectiveness of the programme. This concurs with Eraut and Hirsh's assertion that 'The relationship between time and cognition is probably interactive: shortage of time forces people to adopt a more intuitive approach, while the intuitive routines developed by experience enable people to do things more quickly' (2007, p. 20). More experienced participants generally appeared to be more relaxed about the demands of the workplace learning programme, perhaps indicating that their greater experience made them feel more able to manage those demands, and they also appeared to be more confident in the programme's successful completion in comparison to their less senior colleagues. However, this resulted in a more pragmatic approach to the workplace learning programme, with more experienced participants focusing on a 'what do I need to do to pass' approach rather than, in some cases, the opportunities for personal development which the programme offered. This often resulted in participants being unable to take a more reflective approach.

Individual motivation and the ability to undertake workplace learning activities also impacted on the participants' experiences. This depends on many factors including individual agency, 'which determines how they engage in work practice, with its consequences for their learning' (Billett, 2002, p. 463). However, some of

the factors which affect the ability to engage in workplace learning could be out of the control of the workplace learner and potentially the organisation. To counteract this, organisations would need to ensure all activities associated with the workplace learning programme are undertaken in work time. However, this still may not create 'a level playing field' for all participants due to factors such as previous learning experiences, hours of work, and level of autonomy, which is the next sub-theme to be explored.

5.4 Autonomy

The extent to which participants have the autonomy to manage their own time and implement learning from workplace learning programmes seems to affect the extent to which participants can engage in workplace learning programmes and, as we shall see later, their perceptions of its effectiveness. Morgeson et al. refer to 'job autonomy' reflecting 'the extent to which a job allows the freedom, independence, and discretion to schedule work, make decisions, and select the methods used to perform tasks' (2005, pp. 399–400). They further suggest that having greater autonomy would enable individuals to have increased flexibility in how to undertake the work tasks related to their role (Morgeson et al., 2005). In undertaking my analysis the term autonomy refers to participants' ability to decide how to manage their workloads to meet the demands of the workplace learning programme and the extent to which they have the freedom to do this. There appears to be two facets to this: some participants felt that having autonomy assists with participation, whereas others felt that it acted as a barrier.

Participant 7 on case study 1 noted that autonomy to manage one's own time might be something which line managers endorse; however, in practice it means that the learner, who is at managerial level, is left with the responsibility to attempt to make this a reality. He stated: '*[Y]es [they say] I'll support it, my right hands saying yeah, yeah but my left hand's still sending you work, my in-trays still like this you know and if we had that discussion in our [appraisal], your line manager would be saying well you've got to be understanding of how to balance your time right and all that kind of stuff.*'

Customer expectations were highlighted as a potential barrier to time and autonomy from participants on case study 2. Participant 5 stated that customers' expectations need to come before workplace learning and commented: '*[N]aturally the priority is getting the job done. And it's very difficult to turn around to the customer and say, I'm very sorry, but I'm not available today, because we're looking at this ...*'. This indicates the potential difficulty in balancing a variety of demands and having the autonomy to manage these with the requirements of a workplace learning programme. Participants also highlighted the dilemma of being a manager and having to make choices sometimes about whether to prioritise workplace learning activities or work tasks and the potential personal impact this brings. Participant 3 on case study 2 stated: '*You do have to manage what's more important; is it my business as usual which is what I'm targeted and paid on or is it the course which I am targeted on in a sense to get*

the most out of it ...' [the participant did not express whether this related to a performance related pay scheme or not].

As participant 2 on case study 1 suggested: *'[W]e are expected to do it as good as the day job all the while ... I suppose it has to be a decision that is made upstairs; you know if they want me to do this, what is it they don't want me to do? Cos otherwise they set me up to fail ... they have no conscience about giving you more and more work really because I think culturally they see it as a weakness if you say well hang on a minute I can't do that.'* Therefore, not meeting the demands of both the programme and their work role fully, or at least the perception that they have not been met, potentially results in some sense of failure with possible negative consequences.

Some participants felt they had the autonomy to implement learning gleaned while participating in the workplace learning programme. Participant 5 on case study 1 stated: *'[I]f I was to go to my line manager and say "I've just done this, I really want to put this into action now" he would do everything in his power to find an opportunity for me to put that in, so I can't say no but it would always be by my own volition and that's fine.'* Participant 1 on case study 1 noted: *'I can be positive about it and the line manager that I have and had in my previous role to be fair, in my 3 previous roles, have enabled me to get on and given me that bit of a loose rein to go ahead with some of the work activity that I have done ...'.*

These responses may be partly due to the seniority of the participants and where participants valued the autonomy they had.

Participant 8 on case study 1 stated that it would be more difficult for lower graded workers to participate in workplace learning programmes *'because they have a structured approach to their day and they don't have so much freedom of movement as perhaps I might have as a senior manager. They have to remain available ... So I guess it is harder for them and they have to have a supportive ... line manager at local level to provide them time during the day for that ...'*

Participant 2 on case study 1 stated it could be more difficult for those undertaking shift work within the organisation to undertake a workplace learning programme as they work on a rota and therefore are not able to manage their own time. Participant 6 on case study 1 said: *'I had a couple of days where on a Wednesday or Friday where I'd got nothing on ... then it's more productive for me, rather than spend 2 hours in traffic, to crack on at 8 o'clock in the morning and sit and do my research, get out my books and sit, spread them out on the dining room table and sit and do my assignment but no-one has ever said where were you cause we're allowed to do that. If I was [on duty at the workplace] that wouldn't be possible. I could do the studying but it would have to be at work and subject to everything that goes with being on an operational [workplace] ...'*

If a person is 'on duty' they may not have the flexibility and therefore autonomy to participate in the less formal learning activities associated with workplace

learning. Participant 2 on case study 2 stated: '*[T]here is one guy on the course and he does work predominantly nights and he was ... saying ... how difficult it is for him to even meet with his mentor because his mentor works days and ... because he works predominantly nights for him then to work with people on case studies; preparing presentations; getting support for his assignments is difficult...*'. Opportunities for informal discussion, learning and problem solving may also be affected by these factors. This concurs with Eraut and Hirsh's findings in relation to informal or unplanned learning: 'learning requires both time and support. Learning programmes rarely allocate any time to this form of learning, but just assume (wrongly) that it will occur spontaneously' (2007, p. 39). In the case of workplace learning, participants who are managers often have the autonomy for allocating this time, but evidence from this study suggested that they still felt time was too limited.

Billett argues that some of these less formal types of learning rely on human agency, suggesting that 'to describe learning environments as being either "informal" or "formal" assumes a deterministic relationship between the circumstances in which the learning occurs ... This constitutes situational (social) determinism and ignores the role of human agency in the construal of what is experienced and what learning arises from that experience' (2004, p. 314). However, it was clear from the data that autonomy was not simply something participants could choose but that it relied on a range of factors both personal, for example confidence levels, experience, and capability and organisational, for

example demands and structure of the participants work role, their relationship with their manager and organisational, departmental or team culture.

On smaller work sites, the workplace learning programme participant might be the most senior manager on site so there may be a lack of other appropriately skilled workers to cover for them. Consequently they are potentially less likely to be able to take time away from the workplace in order to undertake workplace learning activities. This will therefore impact on their level of autonomy. As participant 6 on case study 2 noted: *'[T]he operation that I've got up here, I mean I report to a general manager that's not based here; so basically to all intents and purposes I make all the decisions up here ...'*. Therefore, having the autonomy to manage one's own time can be impacted upon by situational workplace features.

Billett refers to how the workplace mediates participation and suggests that 'Workplaces intentionally regulate individuals' participation; it is not ad hoc, unstructured or informal ... Those who control the processes and division of labour, including interests and affiliations within the workplace, regulate participation to maintain the continuity of the workplace ...' (2004, p. 312).

Although Billett does not refer explicitly to autonomy, and indeed the results of the study may suggest this is a criticism of his work, he does explore the issue of agency. He notes that the worker, in this case at managerial level, has agency and therefore can influence how much autonomy they will be afforded. In relation

to this, Billett suggests that workers engage 'in ways that best serve their purposes' (2004, p. 312). Therefore, Billett is suggesting that workers will choose opportunities which best support their aspirations and personal requirements; however, he does not take account of the differing levels and types of support workers may require to participate or the level of autonomy that workers may or may not want or receive. The responses from participants suggested that the level of autonomy afforded to workers was often related to the relationship they had with their manager (which will be explored in Chapter 6), length of time with the organisation, experience and confidence, factors which are not considered explicitly enough in Billett's work.

Likewise, Fuller and Unwin's Expansive and Restrictive Framework (2004) does not explicitly consider autonomy and the impact this can have in workers'/learners' engagement with workplace learning, particularly for those at managerial level. The data therefore suggests that the related literature does not give enough consideration to autonomy, particularly in relation to managing time and its importance in terms of participating in formal workplace learning activities, opportunities to engage in informal learning and the implementation of learning.

5.5 Personal circumstances

The personal circumstances of someone undertaking a learning programme will clearly impact on their participation and engagement. However, for workplace learners tensions in the relationship between a learner's personal circumstances

and their work and learning commitments were amplified. This was due to work being their main focus, workplace expectations on both their work performance and performance on the workplace learning programme and the potential consequences of the perceptions of these by both participants and their line managers.

Participants from case study 2 gave examples of different responsibilities away from the workplace including providing care for young children and household responsibilities. Workplace learning participants' home and personal situations may impact on their ability to engage in the full range of learning activities associated with workplace learning programmes when time is not provided or perceived to be inaccessible from the organisation. This links to Billett's work on affordances, which he explains 'constitute the invitational qualities which will be extended to and perceived by individuals, and which in turn will shape their participation' (2002, p. 462). Although Billett considers how organisations can support workplace learning (or not), he does not consider the impact of external social factors or responsibilities on the individual's ability to participate explicitly. This is a criticism which could be levied, as many writers on workplace learning do not consider power in society and how it relates to learning in the workplace in enough detail. Often it is difficult to give consideration to factors such as social class, gender, life experiences and the potential impact these have on participation in workplace learning opportunities of both an informal and formal nature. I believe that the focus on individual agency and learning over the

lifecourse that I have adopted for my own research has enabled me to consider the relationship between effective workplace learning, organisational support and individual learning.

In relation to the impact of the programme on their time away from work, participant 6 on case study 2 said: *'[I]t's been a lot of time, family time basically weekends doing the assignments etc but then again that's the choice that I have made.'* Participant 2 on case study 2 expressed similar views, stating: *'I think the biggest thing for me and particularly the thing that sort of limits my motivation at times with it is the time that it takes out of my personal time because when you have a full on working week, the last thing you want to do then sometimes is write assignments and pick up books at the weekend ... sometimes you feel that you don't own your weekends and your weekends aren't your own and to do a trip to a library that takes up almost half a day out of a weekend ...'* Participant 5 on case study 1 suggested: *'Well it's just home, that's what suffers, your home life balance is put out of kilter and that's the problem. Our organisation isn't good, they're good at giving you tasks but not taking stuff away to free you up and I'm probably as guilty, I'm a manager so I give people tasks and never take anything off them. It's the cycle of work, the working horse.'*

Potentially having to undertake work in 'one's own time' disadvantages some workers where people have personal circumstances which might make this more difficult than others, for example a parent of four children may have less ability to

contribute their free time to a workplace learning programme than someone without caring responsibilities. As participant 2 on case study 2 suggested: *'There's loads of different constraints, fortunately I don't have any family constraints at home but that's another thing that I imagine would heavily impact people involved on a programme like this.'* Additionally, regardless of home responsibilities, some workers may understandably not want to use their leisure time to undertake work-related tasks.

Billett acknowledges these potential inequalities and suggests that *'Consequently, individuals or cohorts of individuals may experience different kinds and degrees of affordances, depending on their affiliation, associations, gender, language skills, employment status and standing in the workplace'* (2004, p. 319). However, little consideration is given as to how factors such as work role, work patterns and grade, which may potentially affect degrees of affordances, can be addressed.

The personal circumstances of workplace learners and the impact they have on the pressure learners feel are discussed in Harrison and Reeve's study of workplace learners undertaking an Open University Youth Work course. Harrison and Reeve note how adult learners are *'often juggling between paid work, family, voluntary work and study'* (2012, p.7). One adult learner who participated in the study noted the impact one's personal life can have on the way in which they study, stating:

[A]ctually I don't study at all at home because of my kids. I have four children. So I am busy teaching them, I am being their chauffeur, driving them to where they want to go. Then at nights when I'm supposed to study I'm tired ... So it makes me come to school early, so from 7-00am to 8-00am I face my studies.

(Harrison and Reeve, 2012, p.7)

Other participants expressed similar views regarding the difficulties of managing a variety of competing demands where the requirements of the programme impact on family life and vice versa. Within my study it appeared that this issue was not explored by organisers of the workplace learning programmes from the two organisations involved and participants expressed that they were expected to manage the intersections between learning and personal circumstances themselves. Although participants from case study 2 had mentors allocated to provide support, this did not appear to extend to balancing personal commitments with the workplace learning programme.

Work within the HEA Demonstrator Projects on work-based learning did touch on learner support. Fielding (2010) examined the role of the mentor, acknowledging the difficulties participants can face and pointing out how mentors can offer support in relation to balancing the competing demands of the programme and the participant's personal circumstances. She suggests that incorporating a workplace learning programme into the person's life 'requires cultural acclimatisation and identity shifts for the learner' (Fielding, 2010, p. 171). My data suggested that although mentors were allocated (case study 2 only), personal

circumstances and the assimilation of the programme into the participants life/work was not considered (or if it was considered, it was not perhaps in enough detail to enable the workplace learner to be supported). This may have been due to a variety of factors including the seniority of the participants and their place in the hierarchy. As all participants were managers it may have been that the ability to manage one's time in relation to the workplace learning programme, both within and outside the workplace, was seen as implicit. Additionally, as all but one of the participants were male, it is not possible to analyse if gender was an issue here.

Snape and Finch's research with learners undertaking work-based foundation degrees found that 'the main non-financial concerns centred on the pressures associated with family life. The most commonly cited were the pressures of combining work and study (69%), time commitments of the course (56%) and the impact of the course on partners/families (46%)' (2006, p. 7). Although in my study I did not specifically ask participants for details of their personal circumstances, it was clear in their responses to questions about time that in common with the participants in Snape and Finch's study, some found managing these competing demands a challenge.

Workplace learning programmes, according to the data, clearly present some participants with an increased workload which is experienced differently depending on their personal circumstances. There is limited data as to the

potential impacts of this and also if this affects both performance and attrition on workplace learning programmes. Additionally, participants' 'home life' is impacted upon by the demands of such programmes. Further consideration of the role and remit of workplace mentors or other supporters of the programme in this regard would be beneficial in order to provide participants with some support in this area.

5.6 Views of 'time management'

Two facets emerged from the data regarding time management: (a) the process of managing the workplace participants' time and who had responsibility to see that this was adequately managed and (b) that time management was a skill that participants should have or need to acquire. Time management included allocating time to undertake learning activities both in and away from the workplace to enable adequate participation in the workplace learning programme and implementation of the learning gleaned.

(a) Management process and responsibility

How time was managed, and by whom, was a key issue for participants, but different views emerged from the data. In case study 2, participants noted that there was no formal system in place to anticipate and address workload pressures. As participant 2 stated: *'I think in terms of the workload, I think that is something that could be looked at. Certainly for the foundation degree students to get involved in some of the projects that they might want to get involved in,*

their current workloads would have to be looked at because they wouldn't be able to do it on top of it.' Participant 6 on case study 2 stated: *'It's very difficult doing your own job and trying to make time because at the end of the day business as usual, it's our main function, it's not as if we're given extra time off or anything like that to do this foundation degree, we're expected to do this in parallel with our job roles; so that is quite difficult bit that is something that you're actually committed to as well.'* It appeared that very little consideration was given to how participants would manage the additional tasks related to the workplace learning programme on top of their usual work-related responsibilities. The learning and development manager on case study 2 (who was responsible for monitoring and supporting the programme) suggested that time could be agreed in the form of a contract between the manager, the organisation and the workplace learning programme participant. He went on to discuss how it can be frustrating when investment is made in a learning programme but there is a lack of time for participants to fully engage in it. He stated: *[It] 'does frustrate me that we have this massive commitment and recognition of how critical development to people is but just sometimes the operation wins and I can understand why'.* Participant 6, case study 2 echoed this by stating: *'It would be nice for them to say we're going to give you maybe get ½ day off a week or something like that, it would be nice to think that we were going to be given that time guaranteed to do your study etc. but we're not, and to be realistic they were good enough to allow me to do this, I should be good enough to give up my time.'* Here the participant seems to be implying that time allocated for activities related to the workplace

learning programme would be appreciated, but there is an implicit acceptance that the participant must give something (for example, their time) in return for the organisation's contribution (course fees and time to attend workshops) to enable the participant to engage in the programme.

Participants from case study 1 shared similar views, and this was interesting because they were more senior than the participants on case study 2. Participant 7 on case study 1 stated: *'[W]e're not given any study time, real commitment would be, not only have we made you go on this course but we're going to guarantee that once a month or two days a month you will have time for your research and study time. But there's none of that it's just fit it in, fit it in to your day.'* Participant 3 on case study 1 referred to the *'conflicting pressures'* between the demands of work and the learning programme.

Opinions differed as to whose responsibility it was to manage the participant's time in order for them to fully engage with the programme, and there was some correlation between the seniority/experience of the participant and the ability or perceived ability to manage their time. More experienced participants across both case studies, who had been in managerial positions within their respective organisation for longer than some of their colleagues, expressed more confidence in managing their time. This had two dimensions: they felt they possessed the necessary time management skills and that they had implicit or

explicit 'permission' to take time away from the workplace to undertake learning activities. Therefore time management and sense of autonomy are related.

The learning and development manager on case study 2 acknowledged that individual participants on a workplace learning programme experienced the issue of time differently but had to take responsibility for managing their time. In relation to this he suggested: *'[S]ome people are very good at it and they can do it and I guess it's down to commitment as well for the individual, you know you hear of some people staying behind or coming in earlier just to try something, so I think there has to be an element of ownership there from the individual as well, it's easy to blame your manager isn't it not to get the time? But there has to be an element of they do have to manage their own time so I think it's great that we allow them to.'* This is an interesting point as it suggests that responsibility for managing time rests with the participant. However, this appears to conflict with previous discussions around autonomy as some participants reported feeling that they did not have the autonomy to manage their time.

This separation between the intentions of the organisation and the perceptions of participants may be due to differences between the learning and development department's intentions and operational realities. Additionally, the perceptions of the learning and development manager around time management suggest that the organisation has limited responsibilities for supporting participants with this. He did, however, add: *'[W]e give them the opportunity to come back and discuss*

if they think they're not going to hit those agreed milestones but they do have to own their own time'. This suggests that for managers the ability to participate in workplace learning programmes, in part, relies on attributes such as time management which is perceived to be the responsibility of the individual workplace learner rather than the organisation.

(b) Time management as an individual skill

As many participants reported finding managing time to meet the competing requirements of learning and work difficult, this suggests that either they did not possess effective time management skills or, where participants did already have these skills, had difficulty in addressing the competing demands of both their work role and workplace learning. This point related to managers at all levels across both case studies, with senior managers also reporting that they struggled with finding time to engage in learning activities at work. Participant 7 on case study 1 noted: *'I very much find it difficult to allocate my time for development ... unless I book myself onto a course I don't really allow myself any time for personal development...'* This suggests that workplace learning and allocating time for the less tangible aspects of the programme such as completing assignments are more difficult to achieve than for the scheduled aspects of the programme such as workshops. Organisations may find it hard to find ways in which to ensure workers are supported to do this without putting systems in place which may feel too rigid for workplace learning participants. Therefore this is

likely to be an area which requires further consideration, either before the workplace learning programme starts or as an integral part of the programme.

Seven of the eight participants on case study 1 indicated that they did meet the time demands of the programme through the time management skills that they had already developed as managers. Participant 3 noted: *'I think there's an expectation at our level that you've got your own diary, manage your own diary'* and participant 4 stated: *'I'm a manager, I manage my time. I will meet the demands of the programme, I signed up to it.'* Participant 1 stated: *'I think that depends on your line manager but that will default ... back to yourself to manage your time ... I have got a supportive line manager.'* From the line manager's perspective, if the participant's workload has to be reduced or managed this could potentially increase their own workload by taking on some of the participant's work tasks themselves. Therefore, there may be a potential tension for line managers in wanting the workplace learning participant to develop their skills but at the same time being reluctant to increase their own workload to enable this to happen effectively.

This view of time management as an individual skill was expressed less on case study 2, although it was a view shared by some, as participant 5 noted: *'[I] think we're very much left to our own devices, which is very beneficial in a way ... I think the point is that we are big enough and ugly enough to actually work out how to manage our time effectively...'*. This suggests that participants have a

sense of pride in being left to their own devices, and not to do so would imply a lack of confidence in their ability, although for other participants, 'being left to their own devices' may feel more like a lack of support depending on individual confidence levels, experience and capability.

However, some participants suggested that managing time was an intrinsic element of the learning programme. As participant 8 on case study 2 stated: *'[That's] part of your learning isn't it being able to manage your own time effectively'*. Both of the workplace learning (leadership) programmes undertaken by participants included some learning related to personal effectiveness which included fostering time management skills. However, participants did not indicate that this content was applied to the issue of managing time on a workplace learning programme alongside the demands of their work role or whether participating in the workplace learning programme had impacted on their time management skills.

Programmes or organisations which place most of the responsibility for managing time on participants may potentially disadvantage some workplace learners as they might need extra support to manage their time, which may be seen as a weakness. Fuller and Unwin, in their research with apprentices, which was later modified to encompass workforce development, suggested that a feature of an expansive learning environment was 'planned time off-the-job for knowledge based courses and reflection' and that organisations where learning

is 'virtually all-on-job: limited opportunities for reflection' would be regarded as 'restrictive learning environments' (2004, p. 142). These ideas do not map easily for workers who manage their own workloads. All participants in this study were supported to attend scheduled workshops but in reality this meant having to find extra time to undertake work duties that they would have usually been doing when the workplace learning sessions were taking place. Participants reported that there were no reductions in their workload to enable them to participate in the programme. Additionally, time for reflection, as mentioned previously, is probably less tangible to define and organise, but ultimately would have to be squeezed into already busy schedules or undertaken outside working hours. Practitioner research into workplace learning within the HEA Demonstrator Projects (Tallantyre, 2010b) has tended to focus on the experiences and perceptions of work organisations and learning providers rather than on the experiences of learners. One of the projects relating to 'supporting employer-based staff who contribute to academic awards through design, delivery and assessment' (Fielding, 2010) acknowledged the importance of workplace mentors to support participants with managing time. Fielding points to the time pressures mentors can experience, noting that 'Formal programmes require significant buy-in and support from all stakeholders ... in allowing mentors access to resources such as time (as part of their regular workload) and space for mentoring' (2010, p. 176). She also notes that 'Where possible the benefits to mentors, of which there are several, should be made tangible' (Fielding, 2010, p. 176). This suggests that those workers who might provide support to workplace

learning participants also have to negotiate time pressures of their own.

References to time in the literature tend to be in relation to flexibility of learning opportunities rather than the lack of time and the impact on workplace learners of managing it. Tallantyre suggests in the Foreword to the HEA Demonstrator Projects that flexibility is required in order to achieve high-quality workplace higher education learning. However, the flexibility that Tallantyre highlights relates more to 'content [being] more negotiated with employers and employees [and] assessment perceived as relevant to work activity' (2010a, p.4). Although 'learning at times and pace to suit the learners' (Tallantyre, 2010a, p. 4) is suggested, how this might be achieved within busy, performance-driven organisations is notably absent.

The added dimension of managers as workplace learners has also received little prominence. Additionally, the concept of 'managing time' is a contested concept in itself. A focus on this as an individual skill implies that this is the responsibility of the workplace learner and not of the organisation. Billett would argue that 'workplace hierarchies, group affiliations, personal relations, workplace cliques and cultural practices influence the participation and guidance afforded to individuals' (2002, p. 462). Therefore, perhaps organisations that allow more time for workplace learning activities are giving more affordances but this might differ between different teams and departments. As previously discussed, participants' relationships with their managers had a big impact on how much time they either had the autonomy to take or were able to negotiate with their manager. This

relies heavily on the manager's perception of time management and the value they place on workplace learning. Therefore, the data collected would concur with Billett, in that different parts of these organisations appeared to have different approaches to managing time, rather than one overall organisational approach that influenced how time was managed for learning. Reasons for these differences included different work groups and relationships with managers.

The dilemmas participants expressed regarding managing the often competing demands of work and learning, and where responsibility lies for this, would seem to support Felstead et al.'s identification of the 'importance of establishing the locus of power within the productive systems' (2009a, p18). Their Productive Systems framework suggests one means of examining 'where effective control over the whole productive system is located and how this impacts on learning within any particular workplace' (Felstead et al, 2009, p18). This would relate specifically to the issue of time and autonomy, as having the perceived power to manage one's own time will impact on a learner's/worker's ability to engage in workplace activities. However, while Felstead et al. appear to assume fairly stable and similar power arrangements, my data, which focused on middle and senior managers, suggests that different arrangements and power differentials existed due to different leadership styles and a differing capacity to offer support to participants from their managers.

Although both organisations had mechanisms in place to support the participants, including sessions with senior managers and, in case study 2, participants being allocated mentors, it did not appear that formal systems were in place to enable participants to have allotted time to undertake the self-study or less formal elements of the programme, for example reading, reflection, writing assignments. There was a perception from some participants that the organisation expected some of this should be undertaken in the worker's/participant's own time (although none of the participants expressed a quantifiable amount of time) as their contribution to being on the workplace learning programme. This, however, as noted above, can be a problematic assumption.

5.7 Conclusion

The chapter has presented an analysis of the data collected from the interviews with participants from both case studies in relation to the theme of 'time'. Sub-themes which were identified were:

- Demands of workplace learning and time.
- Autonomy.
- Personal circumstances.
- Views of 'time management'.

There was a clear indication from the data that participants perceived that workplace learning could potentially place more demands on learners than more

traditional learning programmes where people undertook learning activities away from the workplace. Participants reported that this was challenging in terms of managing their day-to-day job role, participating in the workplace learning programme and implementing the learning gained (an area which will be explored in greater detail in the following chapter).

Autonomy was explored as a further aspect of the 'time' theme, with this being experienced differently for participants depending upon their length of experience, job role and relationship with their manager. Personal circumstances both within work and outside of it also impacted on how time was experienced while engaging on a workplace learning programme, with participants' career stage and timing of the course being key features. Lastly, it was clear that the locus of responsibility for managing time drew polarised responses from participants, with views ranging from an expressed appreciation for having the perceived 'licence' to manage their own time to participants suggesting that they would have liked more support to achieve this. Learning contracts and having allocated time for the self-study elements of the programme could be useful but not necessarily a panacea and may, if too rigid, be disempowering, particularly for more experienced workplace learning participant managers.

While these findings echo some aspects of Billett's, Felstead et al.'s and Fielding's works, the circumstances of the learners, as senior and middle managers, have added a new dimension and point to the additional pressures

and tensions they must negotiate. These include little or no allocated time to undertake individual activities relating to the programme, confusion around autonomy and licence to allocate time themselves, assumptions around existing skills to manage time effectively and limited consideration of personal circumstances. These are areas which need to be considered further when researching workplace learning and have implications for implementing workplace learning programmes which will be discussed in the following chapters.

This complex issue of time in workplace learning programmes has a significant impact on the way that the programme, the organisation and learners interrelate. The synergy between these three components will be explored in the following chapter.

6 Main Findings/Theme - Synergy Between Programme, Organisation and Learners

6.1 Introduction

This chapter will present the data relating to the potential synergy between programme, organisation and learners and how this impacts upon the perceptions of effectiveness of workplace learning.

Four sub-themes emerged from the data which related to synergy. The first three were strong themes, that is, mentioned more frequently by participants and were seen by them as significant factors impacting on their perceptions of effectiveness. The final theme, measures of success, was mentioned less by participants. The four sub-themes are:

- 1 Organisational strategy, which has two parts:
 - (a) organisational goals, aims and strategy regarding the workplace learning programme
 - (b) organisational decision to use a workplace learning process.
- 2 Learning in the social context of work, which has three facets:
 - (a) managers supporting managers
 - (b) shared learning
 - (c) implementing learning.
- 3 Participants' position in the lifecourse.

4 Measures of success.

The themes from both Chapter 5 and Chapter 6 are brought together in Section 6.6.

6.2 Organisational strategy

Discussions in this chapter will identify how both organisations had expectations around creating an elite group of workers, a 'go to group' of future senior managers who could be utilised to work on organisational challenges as part of each organisation's strategy, or more broadly to drive the organisation's objectives forward. The organisational strategy of each organisation was not articulated explicitly by workplace learning participants, although the commissioning manager and the learning and development manager from the respective organisations were reasonably clear about what these were.

Developing a group of managers who could further develop the organisation and associated objectives was a key aspiration for case study 1 and it was clear that a workplace learning programme was seen by the organisation as being a more appropriate vehicle to achieve the creation of this group than a more traditional, perhaps off site, programme of learning. For case study 2 the learning and development manager emphasised a general improvement in individual skills; however, workplace learning participants perceived that one of the objectives was to create the next tier of senior managers. The synergy between the organisational strategy and the workplace learning programme appeared to be

crucial to perceptions of effectiveness and this will be explored throughout this chapter.

The impact of organisational strategy was expressed by participants from both case studies in two ways: firstly, they alluded to the respective organisation's goals and business strategy, and how the workplace learning programme supported these; and secondly, participants discussed the motivations for using a workplace learning programme to fulfill their organisation's goals and strategy. Both these facets will be considered in turn.

(a) The organisation's goals, strategy and how the workplace learning programme supported them

Creating a group of people who would be pivotal in taking forward organisational change was a feature across case study 1. As noted by the manager who commissioned the programme from case study 1, the organisation's expectations were that the group of learners on this particular workplace learning programme will become *'your 'go to group' ... and I do think that there is evidence to support that the group of individuals that have been through this programme have become involved in quite a lot of the key components of a major change programme'*. The learning and development manager from case study 2 talked about how the organisation had a history of 'growing their own' but recognised that this required input from the organisation. He noted one of the reasons for the organisation choosing a workplace learning programme was that: *'[T]here's*

greater opportunity to align it to the objectives of our business; it helps us meet our strategic requirements; it gives us a clear link back into benefits to the individual, to the department and to the organisation as a whole.' Although expressed in different ways, both the commissioning managers from case study 1 and the learning development manager from case study 2 were clearly expecting workplace learning participants to contribute to the future development of the organisation.

For participants from case study 1 there was tension here in that participants felt that there were difficulties in being part of a 'go to group' because of perceived differing work pressures and geographical locations, as discussed in Chapter 5. This issue will be discussed further in Section 6.5.

Most of the participants in case study 2 reported that the organisation's expectations for the workplace learning programme were that the participants would develop the necessary skills to become future senior managers; therefore the organisation strategy relating to the programme focused around succession planning. Participant 5 noted that: *'[T]he reason they're putting people onto these courses is because they see them as senior management of the future and they're looking at developing people into more rounded managers.'* Some participants thought that the programme was about developing individuals to be better equipped within their current roles and did not state a connection to

potential senior manager posts, succession planning or organisational development, thus expressing a person-centred perception of the programme.

Other participants from case study 2 were less clear about what the organisation's expectations of the impact of the programme were and it wasn't clear whether the participants had been informed about what the organisation expected of them as a result of undertaking the workplace learning programme. Most participants, however, offered suggestions about what the organisation's likely expectations were. These included return on investment, with most participants feeling that that the organisation had invested heavily in them to enable them to both access the programme (for example funding, time off to attend workshops) and to get the best from it (by organising master classes, providing mentors). Participant 3 suggested that this investment meant that the organisation was monitoring the programme's effectiveness closely, stating: *'[I]t's work based so you are a bit more focused because you're probably aware that eyes are on you ... I think you have to put a bit more in because the eyes of the business are watching you and have you been a good investment on the course.'* This suggests that some participants may have felt under scrutiny by the organisation to demonstrate they were actively engaged with the activities within the programme. Participant 8 suggested that the organisation's expectations were that: *'[W]hatever you learn from this you put in to practice, and it benefits the organisation in the long run ... I think the organisation hopes [this] for the 17 of us that are undertaking the programme.'* This indicates that the organisation

was keen to see that it benefited from the programme and there were expectations about how participants used the learning they had gleaned.

Participants from case study 1 were less able to state what the organisation's expectations of the programme were. Participant 1 stated: *'Can I be bluntly honest and say I don't really know. There are different theories about that kind of learning within the organisation at the moment ...'* and this was a view that four other participants on case study 1 concurred with. It was difficult to ascertain from these participants whether expectations or the strategy behind the programme had been identified but not communicated to the group, communicated but perhaps not assimilated or whether because the programme was a pilot, expectations had not been established.

Participants from case study 2 expressed that the programme had been developed to meet a potential gap in development opportunities for middle managers, as participant 2 noted: *'This is the first time, they've done something specifically aimed at developing middle managers, ... you know I think everybody was really grateful that they'd done something specifically targeted at us.'* Participant 7 stated: *'[I]t was offered out to a certain band of people who had been highlighted through ... [our] talent pipeline ... and that highlights who the next people are through development etc and it was offered to a group of people and it was completely voluntary if you wanted to do it or not.'* Some participants indicated that being on the programme was a sign of 'prestige' within the

company and that to be offered a place on it was seen as being a manager with potential to develop. This may have been linked to their organisation's perceptions of employees' ambition to progress, meaning that participants may have felt compelled to participate in order to maintain the organisation's positive perception of them. This perceived 'prestige' was not expressed by participants from case study 1, perhaps because of their already acquired seniority.

Many of the participants in case study 2 used the term '*home grown timber*' to signify how the organisation is keen to develop people, and many of its managers had risen through the ranks, having joined the organisation at lower levels. One participant noted that participants were likely to view a workplace learning programme as a benefit because it fitted in with this philosophy. They suggested that: '*[T]hey've got the [organisation's] mentality so this is just an extension of that really. I mean you're not going to find much resistance because I mean they just wouldn't be in this position [in the organisation], they wouldn't be on this course, they wouldn't be in the role that they are in because they just wouldn't have got there ...*'. This demonstrates the participants' alignment to the 'home grown timber' philosophy, possibly because they may have personally benefited from this approach.

Two of the participants on case study 1 suggested that the organisation's expectations were that they would develop their skills and therefore be better equipped to undertake their roles as well as the organisational challenges of the

future. However, participant 3 highlighted the difficulties in defining 'who' the organisation is, stating: *'I think that's different in terms of what you define as the organisation, and I'll go with that in terms of the people who are driving it, the organisation expectation is that this will develop middle managers to meet the challenges of the future and make them better and have a better organisation...'*.

The implication here is that different managers and levels within the organisation might be looking for different outcomes from the programme.

Although participants across both case studies had difficulties articulating their organisation's strategy with regard to the workplace learning programme and organisational development, they did identify that their respective organisation had a 'structure for progression' (Fuller and Unwin, 2004, p. 142), a feature of Fuller and Unwin's Expansive and Restrictive Framework. However, this was more acutely expressed by participants from case study 2, who potentially benefited more on a personal basis from the ethos of 'home grown timber'.

(b) Organisational decision to use workplace learning

Participants across both case studies said they were able to see a link between their organisation's overall strategy and operational practices, and workplace learning activities. On both case studies these included workshops, one-to-one coaching sessions with the workplace programme facilitator (where participants could talk about their jobs and contextualise the programme to their work role),

self-study materials accessed by an online learning platform and work-related assignments or projects.

On both courses (the certificate programme and foundation degree), assessment methods differed depending on which module was being undertaken.

Assessments were designed by the workplace learning provider in conjunction with representatives from each organisation and were marked by the workplace learning provider. Participant 2 on case study 2 said: *'[T]he 1:1s that we have with [the university facilitator of the workplace learning programme] where he comes here to site are very beneficial and that time when you can have him to yourself to talk through issues to your job role and he can give you guidance on those.'*

Participants were explicit in recognising the clear links between the programme and their individual work role. Participant 3 from case study 1 suggested: *[It's] about where you actually look at some live issues that you would have within the organisation ... I'm finding it really useful because we are doing most of the assignments on what is actually happening in my business.'*

Most participants noted the importance of aligning workplace learning programmes to work, not just in the content but also in the learning process. Participant 5 on case study 2 defined workplace learning as being the link between the learning curriculum and their work environment, stating: *'From the*

very onset we said ... that this has to be about real work it has to be about things in the organisation – it has to be real to me.' Participant 2 on case study 2 shared this view, stating that: *'[The programme] differs from what we've done before because it's linking the theory to what we do and current issues that face us, so we're able to use it quicker, this sort of learning and be able to apply it quicker to our everyday role.'* Participant 8 on case study 2 expressed a similar view: *'[I]t's really relevant with what we're doing as well and you can tie that back into the work.'* This concurs with Billet's views that the workplace is the curriculum and should be the focus of workplace learning activities: *'Practices that invite, structure, support, and guide participation are likely to engage workers in the kinds of thinking, acting, and learning that are important for effective vocational practice'* (2006a, p.45).

Participants indicated, particularly across case study 1 that the workplace learning programme that they were undertaking contained structured opportunities for reflection and programme assessments contained reflective tasks. This was seen as valuable by participants and one of the key benefits of a workplace learning programme, as participant 4 acknowledged: *'I think absolutely everything we do, we should reflect upon and improve and take the learning principles into other spheres ... so everything is a constant journey, is a constant improvement. You get ... plan-do-learn-act which will be the Kolb's learning cycle ...'.*

Participants identified that there may be a negative aspect to this approach, where the learning might be seen as being insular and not wide-ranging, which could further reinforce a lack of fresh thinking in the organisation. Some participants were concerned that because workplace learning was delivered in the workplace, this did not foster learning from others, that is, from those with different experiences of other organisations. Participant 2, case study 2 stated: *'[Y]ou can be very blinkered in that you are looking very internal all of the time and I know we are encouraged to look at other organisations and think outside of XXX but I think you can very much get drawn into having a blinkered [view] ...'*. With regard to this, Participant 7, case study 2 noted: *'[M]aybe going forward as more and more people get involved in this that will grow that network and people will be able to go and work with other organisations and go and see what they do ... Maybe ... secondments or something like that; job swaps you know go and work in another organisation for a period of time where you are going to get a real insight not a day here and a day there ...'*.

Participants from case study 2 reported that the workplace learning programme facilitator had considered the feedback regarding this and arranged sessions with participants from other organisations also taking part in workplace learning programmes. This insularity of 'communities of practice' and the less positive aspects of such groups is acknowledged by authors such as Wenger et al. who suggest that 'Communities of Practice ... have a downside. They can hoard

knowledge, limit innovation, and hold others hostage to their expertise' (2002, p. 139)

Participants from case study 2, who were far more geographically spread out than participants from case study 1, discussed the difficulty of the programme encompassing all parts of the organisation, noting that at times some of the content and experiences shared as part of the programme were not relevant to everyone. Participant 5 noted: '*[S]ometimes you do get the areas, the case studies when you're looking at things and talking about things and it's just not relevant to what we do, but that's the price you pay for having it as being cross-divisional.*' This may be also due to the large size of the organisation and the wide geographical spread of work locations. Workers within smaller organisations might have different experiences in relation to this. Therefore, this brings into question just how much workplace learning programmes can be related to a participant's work role, particularly where the organisational structure encompasses diverse roles and geographical locations.

Focusing on the potential organisational benefits of the workplace learning programme, the manager who commissioned the learning programme from case study 1 indicated: '*[W]e will use live issues that are issues for us within the organisation ... [and] ... approaches to delivering solutions.*' The manager is indicating that current organisational challenges were used as part of the curriculum of the workplace learning programme, with participants working on

these challenges and identifying potential solutions. This reflects the centrality of work tasks within the workplace learning curriculum as outlined by Billett (2006a).

The learning and development manager on case study 2 stated: *'I think workplace learning ... it's a whole spectrum of things, and I'm going right from learning the actual process in your role right through to those softer skills that can't always be explained in textbooks and how we go about our demeanor and dealing with people.'* He also noted the benefits of the perceived speed of application of learning by suggesting that *'embedding it straight away in and having that ability to come back and share that benefit good or bad, just bringing it alive. You talk to them and that's what they tell you, it's that opportunity to make the link between the two.'* This suggests that workplace learning needs to be more immediately applicable and, possibly, demonstrably useful in order to be seen as distinctive and effective.

This perspective resonates with policy intentions surrounding workplace learning (for example Leitch (2006) and Wilson (2012), see Chapters 1 and 2) that focus on HEIs delivering programmes which foster essential skills and knowledge required by employers rather than employer needs 'fitting in' to existing HEI provisions. The essential link between the workplace and the learning programme is also of note here, and Harris's view that the content of a workplace learning programme needs to be closely aligned to the workplace (Harris, 2006).

This need for alignment is also highlighted in the HEA Demonstrator Projects where McTavish and Bayley (2010, p. 235) note that

the curriculum is predominantly derived from application of the learning context (i.e. the workplace) as well as learners' current knowledge and experience ... (*and*) ... centred on the application of learning in the workplace ... This makes sure that the workplace – the primary site of learning – provides an opportunity for the practical application of knowledge and skills.

However, some participants reported that although the workplace learning programme had been tailored to meet the needs of the organisation, and work undertaken by the participants had influenced the curriculum, there was a sense of separation, particularly from participants from case study 2, between the programme and their own work. These participants stated that the programme was not always aligned closely enough to their individual work role. This appeared to be partly due to the different roles undertaken by members of the cohort, with some learning activities seen as being tailored to some but not to others. Although not explicitly expressed, it may have been that the organisation wanted participants to have wider capabilities beyond their current job roles. Billett suggests that 'Employers might also want to extend the workers' skills to make them more broadly deployable within the workplace, or aim to secure a greater sense of attachment to the workplace through a process of developing their skills and understanding about its particular requirements' (2006a, p. 39).

There is also an implication, however, that aligning workplace learning to the work environment can be a complicated process.

This section has reviewed how participants perceive the links between organisational strategy and the programme. It focused on how the workplace learning programme might be supporting organisational strategy, as far as they were aware, and on the organisation's motivations for using a programme that is work-based.

Participants from both case studies reported that organisational expectations included organisational change as well as personal development. There was also an expectation that by engaging in the workplace learning programme both organisations were creating a group of people who would be called upon to work on specific organisational challenges and shape their respective organisations going forward. However, many of the participants across both case studies were unclear about the exact expectations their organisation had of them with regard to the workplace learning programme; this being a stronger theme on case study 1. Participants on case study 1 appeared to assume what was expected of them rather than feeling they had been made explicitly aware of it. Participants on case study 2 reported that the programme had been developed to meet a potential gap in development opportunities for middle managers within the organisation. Potentially, this lack of absolute clarity around objectives expressed by organisational representatives may usefully allow for expressions of different

objectives at different times, perhaps due to the changing priorities of their organisation. However, for workplace learning participants this may cause uncertainties.

Perceptions of success are intrinsically linked to how well supported participants feel by their managers, their position in the lifecourse and how their success on the workplace learning programme is judged by themselves, their managers and the wider organisation. These are all factors which are important for creating synergy in the relationship between the programme, organisation and learners. This highlights the complex nature of effective workplace learning which will be explored in the remaining sections of this chapter.

6.3 Learning in the social context of work

This theme encompassed three areas: (a) managers supporting managers, (b) shared learning and (c) implementing learning. These will now be considered in turn.

(a) Managers supporting managers

Participants from both case studies highlighted the importance of having a supportive manager in order to achieve effective workplace learning. In case study 2 this was within a wider organisational framework of support for workplace learning that included the use of mentors, which will be explored later in this chapter. The importance of support offered to participants by their own manager

and how this impacted on perceptions of the effectiveness of the programme was a key finding in this study. The expectations participants had of their managers differed, with some participants preferring a more laissez-faire approach to support and others feeling that they would have liked more structured support. Additionally, the reality of their experiences, regardless of their expectations, differed also.

Within case study 1 the role of the line managers of the participants, and how they offered support, was a contributory factor regarding the perception of effectiveness of the workplace learning programme by some participants. The manager who commissioned the programme, and who was also initially a participant, suggested that how line managers supported staff can actually be linked to performance noting: *'[Y]ou can see people that come from certain areas and certain styles of management are consistently performing better than other areas. It's getting to a point now where I would say it's irrefutable.'* In relation to the workplace learning programme, he added: *'[I]t's clear to see where there has been line management involvement with the participants; they seem to have performed better than where there is a lack of line management involved.'* However, he did not expand on this further to identify what styles of management were more conducive to effective support of workers.

There were, however, a range of responses from learners in relation to how much one's manager influences the effectiveness of workplace learning. Some of

the participants (who were all managers themselves) mentioned how supportive their managers were, like participant 5 on case study 1 who stated: *'He's ... been really supportive of it all but he can't just free up magic time for me either ... He can say take some time off, go away you don't have to come in but the work doesn't go away, so all it means is I defer it until another day but no he's been very good ...'* Participant 2 on case study 1 stated: *'I've just had a change of line manager for myself and he is very much involved and I guess he'll be more involved and supportive in this than my previous line manager.'* This indicates that potentially, good support from one's manager relies on individual managers' work practices in relation to managing people rather than formal and prescribed organisational guidelines. It also suggests that line managers may, in common with the people they are managing, experience difficulties in balancing the priorities of workplace learning, and work generally, within the organisation. Participant 3 on case study 1 stated: *'My direct line manager hasn't really asked me about the programme at all. My new director obviously is [involved in] the programme so therefore asked me how I feel about it, what do we want to do, what you think of things and those kind of things, so I expect it's about who you see as my line manager depends on what answers I give to that one.'* Participant 4 on case study 1 stated that his manager was *'not against it, he doesn't stand in the way it's just that he knows nothing about it'*.

As with case study 1, participants from case study 2 perceived the support provided by the line manager as one way in which the organisation supported

them through the programme. Again, this manifested in different ways whereby some line managers took a more laissez-faire approach but support was likely to be given if requested, as participant 6 on case study 2 noted: *'I have been told by my line manager that if you need a couple of hours off to read books etc go to the library that's fine; the trouble is business as usual, right, and I find it very hard to take time off.'* Other participants reported that their managers proactively gave support to the workplace learning participants by providing regular scheduled support. Participant 8 from case study 2 stated: *'[M]y line manager set me a personal development plan as well, so the objectives in there ... link it to the programme.'* Participant 5, also on case study 2, said that his manager was currently undertaking a programme of learning, so this influenced the level of understanding he had around the support the participant needed. Participant 7 talked about how motivating his manager was and how the support from him had been essential: *'[H]e's very good at looking at things, you know when we are looking at assignments and you're not quite sure what you're doing and he can kind of sit down with you and in five minutes can say well why don't you do this, this and this ... yes that's brilliant I'll do that ...'*. This shows how some participants were provided with very useful support from their manager and this appeared to enhance the learning from the workplace learning programme greatly.

Participants from case study 1, perhaps due to their greater seniority, spoke about the impact of their manager less than participants from case study 2. This

is potentially linked to their perception of autonomy as discussed on Chapter 5. However, three of the seven participants from case study 2 could not identify ways in which their manager influenced the effectiveness of the workplace learning programme, as participant 6 noted: *'I believe I'm kind of doing this for myself. My line manager ... we don't really talk about it that much.'* This indicates that the relationship a participant has with their line manager or the characteristics of the participant's particular manager may impact on the support they are offered. Participant 2, case study 2 commented on this, suggesting that: *'[D]epending on the relationship that you've got with your line manager and how your line manager interacts with you, you may get additional support from that manager and I'm fortunate that I do but I know that's sort of down to something that I have had to instigate with my manager and she has with me, as opposed to the company mandating that you will review your foundation degree student's work and talk them through it.'*

Line manager support and how this manifests itself for individual participants might rely on the implicit values of the participant's line manager. These could be influenced by the line manager's own experience of workplace learning (as was suggested by participants in the initial study) and the value they place on it both in terms of how useful it is for the individual participants and in terms of how it might impact on their team's overall effectiveness. The value individual managers ascribe to workplace learning can have a major impact on a workplace learning participant's perceptions of the effectiveness of the programme. This suggests

that more consideration needs to be given by organisations using workplace learning to the views of line managers and how these impact on the support they provide, and whether the levels of support need to be defined or monitored.

It appears that there are differences between the support that participants want and receive from their line manager. Support was discussed generally by participants rather than the specifics of what support they would like. However, those who received the support they wanted were able to identify what it was they had found helpful, which tended to focus on time to undertake or support to complete assignments. In research with less experienced workers, Eraut and Hirsh point to the importance of line managing in supporting workplace learning, noting that 'local managers had significant opportunities to facilitate learning through their allocation of work and support of novice workers' (2007, p. 33). They also suggest that this support can be provided by a range of people but it is for the line manager to create a climate where workers are enabled to take responsibility for their workplace learning (Eraut and Hirsh, 2007). Although my research focused on managers at various stages of experience, the data suggests that some participants would like more practical support from their managers and the extent to which they require this differs.

In terms of support from others, mentors were allocated for participants from case study 2. These were seen as valuable but did not appear to replace the importance that some of the participants put on their manager's involvement and

support. Participant 2 on case study 2 noted the importance of having a mentor outside their own management structure: *'The mentors, that's a really good scheme to allow people to speak to people outside of their immediate line management. I'm just in the process of changing my mentor because of the change in structure and where I now sit, my mentor is now part of my line management structure and so I'm changing who my mentor is so that I have got that outside insight and opinions and also it allows me to freely discuss my development with that person without any conflict of interest and making them feel awkward.'* This participant clearly valued the support they could get from a mentor providing them with a different perspective of workplace issues in relation to the learning programme. Fielding (2010) notes the potential conflict which can occur when a workplace learner's manager takes on the role of mentor and suggests that it is important to separate these roles. A mentor who is not in the participant's line management structure can provide more objectivity and potentially enable the participant to share their thoughts more freely. Participants on case study 2 stated that having people outside of their line management structure was useful, supporting Fielding's observations regarding the use of mentors.

The use of mentors to complement the workplace learning programme was not a mandatory part of the programme as devised by the higher education workplace learning provider. It was not clear if this had been instigated by the organisation in case study 2 or suggested by the learning provider. Mentors were not used to

support participants in case study 1 and their absence was not raised by participants. However, shared learning was more of a feature for these participants, so perhaps this and their higher seniority and experience meant that they did not feel that the lack of mentors had negative consequences for their participation in the workplace learning programme and associated activities.

Although many participants identified the importance of structured support from their managers and mentors, some also talked about a general approach that managers might employ with workers which could support learning at work. Participant 7 on case study 1 recounted an incident to illustrate his understanding of his own role as a manager in supporting informal workplace learning and also how a manager's interpretation and recognition of learning from experience can impact on work practices: '*[W]e had a [major incident] ... it was a great [piece of work], now the guy that did [it] could have been disciplined for breaking the rules but he didn't, he actually did the right thing, so I painted that as a real positive ... got him to write the report on it and said well instead of just hiding what you've done, can you write it up into a bit of a case study ... the rationale, dynamic risk assessments and your actions. He did that and I forwarded it ... and said that is what you need to be doing. So it appeared at every [location] in paper on their notice board.*' (Words not in italics are the researchers own words to protect the identity of the organisation and participant.) However, this participant indicated that this approach may not have been used across the organisation and that it could have been questioned. Thus an event such as the one described above

could be constituted as a learning experience or seen as an error or mistake requiring a more punitive approach. Participant 7 on case study 1 is also identifying the importance of managers supporting individual learning and ensuring that there are organisational benefits by disseminating this to the team and wider organisation.

Across both case studies, support from line managers was not mandatory and therefore any that was offered relied on their individual perspective, and the agency of the participant. Billett (2008) explains how the workplace can offer affordances but also explores the importance of learner agency in shaping the worker's engagement with workplace learning opportunities. However, his explanation of learner agency does not explain how agency is afforded, as Lee et al. (2004b, p. 29) point out:

Whilst Billett identifies agency in his analysis he does not explain it as grounded within ... social relations and tensions. This has the effect of suggesting both a voluntarism, which through his acknowledgement of contextual constraints he clearly seeks to avoid, and a reified organisational structure which is somehow independent of the individuals through whom it operates.

Some participants require more support than others so actively seek it, whereas others, perhaps more confident or experienced participants, feel that they don't require this support. However, some participants did indicate that they would have liked their manager to show interest in the work they were doing on the

programme, as participant 8 on case study 1 stated: '*[F]rom my line manager's perspective I've just been asked about how I've been coping with the workload, how I found the additional work, no real focus on what I could get out of the course if I'm honest with you.*' Other participants expressed similar experiences, with participant 6 on case study 1 stating: '*[M]y line manager didn't fill [the evaluation] in and I leave it at that, I have asked him about three times. He just didn't fill it in, and I said I'm not asking again because I'm just getting bored of asking now.*' Therefore, for some participants, it would appear that there is an unmet need for support from the line manager.

When participants noted that their managers were supportive on a reactive basis, that is, if they asked for support they got it, this tended to be practical support, for example time to undertake assignments. This 'reactive support' was not necessarily seen as a negative aspect of the programme and some participants appeared to be happy with this arrangement. Other managers seemed to take a more proactive approach, assisting workplace learning participants by helping them plan assignments, suggesting books, offering support to understand difficult concepts and explaining how to implement learning.

Many authors have pointed to the importance of the manager's role in supporting participants undertaking workplace learning programmes and the impact this can have on the effectiveness of the programme. Munro and Rainbird's research into supporting workplace learning in social care (2000) concluded that the manager

was seen as pivotal in enabling effective workplace learning to happen, not only with regard to the practicalities of being able to attend but also with regard to implementing and sharing learning within the workplace learner's team. However, a particular difficulty here is separating the manager from the organisation. It could be argued that the manager *is* the face of the organisation as discussed previously and that therefore the organisation could prescribe how managers confer (or otherwise) opportunities for effective workplace learning. For many workers their link to 'the organisation' is through their manager and therefore the way their manager supports them with workplace learning will potentially impact on their perception of how supportive the organisation they work for is. This concurs with Eraut's research with early career professionals where he concluded that 'Managers have a major influence on workplace learning and culture that extends far beyond their job descriptions' (2007, p. 420). However, he suggests that this is a role shared with the wider organisation, suggesting that 'Their role is to develop a culture of mutual support and learning, not to provide all the support themselves. They need to share this role with experienced workers, and this implies some form of distributed leadership' (Eraut, 2007, p. 420). This distributed view of support did not seem to be reflected in the way in which participants from my case studies described support for workplace learning. Support from line managers was cited as a crucial element but the participant's perception of what this entailed was not clearly defined. Additionally, across case study 1, how the wider organisation contributed to a 'network' of support for workplace learning was not explored by participants. It could also be

that they simply did not require a high level of support due to their previously acquired skills and abilities. However, within case study 2, in addition to the mentoring scheme that was in place for participants, the learning and development team had a high profile, and there were activities such as coaching sessions used to review learning, and meetings with senior managers, which clearly indicated support from the wider organisation. These activities were mentioned by participants across case study 2, with the relative value of these activities to participants' learning and the effectiveness of the programme varying.

(b) Shared learning

Participants across both case studies expressed the value of shared learning and how this enabled them to further develop their skills, which Fuller and Unwin refer to as 'Knowledge and skills development through participation in multiple communities of practice' (2004, p. 142), although they did not explicitly refer to them as communities of practice. There appeared to be three aspects to shared learning: 'sharing across', 'sharing up' and an unmet need for 'sharing out'.

Some of the participants from case study 1 talked about the learning shared across the learner group and with colleagues which had taken place during the workshops associated with the programme, whereby problems had been considered and solutions identified. There was a view that working together with people who share very similar challenges and have an understanding of the

culture of the organisation was one of the main reasons why workplace learning can be beneficial. As participant 2 on case study 1 noted: *'Sometimes I like the open discussions because a lot of them have a lot to say and I'm a thinker, just sit there listening and thinking oh yeah that's really useful ...'*. There were some references made by participants to the knowledge of the workplace learning programme facilitators, which related to more cognitive approaches to learning and 'learning by acquisition' (Sfard, 1998), but this was expressed far less than the benefits of shared learning.

Participants across both case studies highlighted the benefits of working with colleagues on the workplace learning programme and how there was a shared understanding of their respective organisations which would not have been present if they had attended a programme of learning away from the workplace, not with colleagues. However, this was a much stronger theme on case study 1. This resonates with Lave and Wenger's views of communities of practice (1991). However, as this model does not consider the needs of more experienced workers, Thorpe's subsequent work on this model and the need to understand 'causal effects, processes, outcomes at different levels ...' (Thorpe, 2003, p. 6) suggests that more complex consideration of how communities of practice operate for more experienced workers is required. Fuller et al. suggest that 'experienced workers are also learning through their engagement with novices, and that part of the process of legitimate peripheral participation for many novices is to help other workers to learn' (Fuller and Unwin, 2004, p. 64).

Communities of practice require individual commitment and licence from the organisation and individual managers, considerations which are perhaps not emphasised enough in later iterations of this model.

The organisation in case study 1 had tried to foster a 'sharing up' of the learning gleaned from the programme by putting in place processes for participants to share their ideas, which might positively develop the organisation, with more senior managers. As participant 1 stated: *'Some of the things we have learnt ... and the last assignment that we had, we presented it to a couple of quite senior ranking officers ... within the organisation. It was well received'*

Participants from case study 2 also highlighted the benefits of sharing learning but focused more significantly on the potentially insular nature of workplace learning as discussed earlier in this chapter. What was lacking for them were opportunities for 'sharing out', which would have involved sharing learning with people outside of their organisation.

Participants from case study 1 noted the importance of group dynamics and how trusting colleagues who were also undertaking the programme was important. There was a sense that sharing problems within the group had been initially a little daunting but had reaped good results for individuals in terms of problem solving. Participant 3 on case study 1 talked about the relationship between participants: *'Trust, honesty, integrity that you can discuss things openly in the*

room and that you are open and receptive to very conflicting views ...'.

Participants 4 and 6 on case study 1 expressed similar views: *'[G]ood learning would be a platform or network to share learning with others ...'.*

For participants from case study 1, shared learning was an importance facet of perceptions of the effectiveness of the workplace learning programme. However, although participants from case study 2 also mentioned working with colleagues, a stronger theme was the potential for an insular approach to learning to emerge, with resistance to the application of new knowledge and ideas.

(c) Implementing learning

Participants from both case studies discussed implementing learning from the programme and again there were differences between opportunities provided to do this. It was only participants from case study 2 who identified that the support of one's line manager was valuable in implementing learning and thus impacted on their perceptions of effective workplace learning. Much of this seemed to depend on how confident the participant was to 'try out' the new learning and how supportive their manager was in enabling or allowing this to happen. Also, it was interesting that participants did not offer much detail in relation to what support the line manager could provide with regard to implementing learning. Where it was mentioned, it tended to be in relation to line managers providing 'licence' to try new ideas or approaches rather than more practical support.

Eraut suggests that there are five interrelated stages to enable transfer of education into the workplace including 'recognizing what knowledge and skills are relevant; transforming them to fit the new situation and integrating them with other knowledge and skills in order to think/act/communicate in the new situation' (2004, p. 256.). Eraut acknowledges the importance of having a person, who is often their manager, to assist the worker in extracting the learning from work. According to his data, having a facilitator of learning can be problematic in terms of factors such as time, relationship, experience of the worker and more consideration of this role in relation to senior managers and the associated skills required needs further investigation. Although Eraut is referring here to research with workers in the early stages of their careers following their professional training, this is relevant to the data within this research as participants were in different stages of their management career (more early career workers, particularly in case study 2, and late career managers in case study 1).

Participants did not perceive that the transfer of knowledge was a complicated process in itself; however, finding time to actually do it was difficult. It should be acknowledged that perhaps one of the limitations of Eraut's research is that it did not address the workplace learning issues in relation to more experienced workers. Participants appeared to need and value support from their managers differently, which might indicate that experienced workers need less support to work through Eraut's five interrelated stages. An alternative explanation could be that participants were being supported through Eraut's five stages by

engagement with the workplace learning programme and its stakeholders – for example the higher education workplace learning facilitator, other participants and, for participants on case study 2, mentors.

The implications of this are that effective workplace learning relies on the ability of managers to support or enable knowledge transfer and implementation of learning into the organisation. Participants across both case studies indicated wide differences in the support received from their manager, and therefore the kind of support suggested by Eraut is potentially aspirational and not given enough consideration when designing workplace learning programmes .

Coetzer's research into attitudes towards learning and the attitudes of managers (2007) has relevance here. Coetzer noted that most workers, with the exception of managers, believed they learnt most from their colleagues. Middle and senior managers participating in the research may, according to Coetzer (2007), have seen this type of activity as having lower value. This could be related to limitations on time and these managers taking a pragmatic approach to concentrate on learning that 'they have to do' rather than learning which isn't seen as essential or formally organised. This might also indicate that as some managers become more senior they place less value on less formal learning themselves and therefore do not recognise the need to offer support for this to the people that they manage. Coetzer's research did not consider managers who

were managing less senior managers and therefore it cannot offer further insights into this.

This raises the question of how organisations arrange managerial support for workplace learning participants and whether this is best organised and prescribed centrally, or whether this should be negotiated on an individual basis for each workplace, learner or group between themselves and their manager/s. Participant preferences appear, according to the data, to be based on factors such as seniority, experience and confidence levels. As much diversity exists within these factors perhaps a flexible approach should be adopted in order to encompass different needs. Billett suggests that 'an individual's sense of self and its exercise through her or his agency and intentional acting does much to direct and shape this learning and also the on-going remaking of the practices enacted at work' (2006b, p. 1, quoted in Brown et al., 2006). The importance of individual agency appears to be crucial to how participants interact with both their workplace and the learning which takes place within it. Therefore agency will affect both the type and the amount of support individuals require.

6.4 Participants position in the lifecourse

The data collected across both case studies suggests that perceptions of the effectiveness of workplace learning may vary depending on the age and related personal circumstances of participants.

Although I did not ask participants for their age, the majority on case study 1 generally appeared to be older than those on case study 2. Participants from case study 1 generally appeared to be in a different position in their lifecourse from those in case study 2. Some of those on case study 2 talked more about having young families than participants on case study 1, and some on case study 1 indicated how close they were to retirement. Of the latter, some felt the programme would have been more useful for junior or less experienced colleagues. This was seen as a factor by these participants with regard to both their motivation and the impact the programme might have on individual performance.

In relation to the timing of a workplace learning programme and learning through the lifecourse, participant 1 on case study 1 added: *'It's probably the timing of the input as well. It's come at exactly the right time for me, because when I undertook it, I'd just gone through a recent upgrade. The input, some of it's been a refresher, some of it's a total new learning for myself. It came right at the point where it was required. I think some of the people that have had the training, no disrespect to them but they're coming towards the end of their careers.'* He went on: *'Learning programmes they are a benefit so long as they are correctly targeted. When they're targeted at the right level, they have to be targeted (no disrespect to people who are about to retire) at the right time as well.'* Participant 7, case study 1 expressed similar views, noting: *'If I was given a choice I wouldn't*

have done it to be absolutely honest, I'm at the back end of my career.' The timing within the participant's career appears to be crucial to their perceptions of the effectiveness of the workplace learning programme. This concurs with Eraut et al.'s assertion (2000) that courses need to be delivered at the correct time in order to be effective.

Some participants noted that the timing for them was good because now they were managers they had experience to which they could apply the theory. As participant 2 on case study 2 stated: *'[T]he benefit of doing something a bit later in life as part of the workplace, you've got that bank of experience to draw on, whereas you don't really have any work experience or limited work experience to draw on when you are going through a university degree programme at 18 to 21.'* Participant 6 on case study 2 concurred with this: *'I thought it was a great thing and as I've said it was always something I felt personally that I've had the experience of working in the place because I've been doing this job for many years but I've never actually had the paper qualification, so in normal life you feel that you know how to manage staff but this gives you another insight as well which maybe you never had before, and you kind of gel the two bits together the experience and the theory.'* Therefore, workplace learning for managers might be seen as working in two ways: firstly, by supporting managers to gain the necessary skills and knowledge to undertake the role; and secondly, by supporting managers to make sense of their experience and apply theory to their previous and existing experiences and practice. These, of course, could also

blend into one another. A mix of participants could be mutually supportive in a workplace learning programme, with more experienced workers enabling knowledge transfer to less experienced colleagues who, in turn, may be able to offer more senior colleagues insights into different ways of working.

Bimrose and Brown suggest that organisations do not give enough consideration to the needs of older workers in terms of both their learning requirements and the methods used to address these (2009, p. 220), and my data supports this view.

This indicates the need to consider the needs of participants more carefully prior to selection and within the formulation of workplace learning programmes.

Participants from case study 1 were close to retirement, and although this shouldn't exclude them from participation, it may mean that the programme needs to be developed differently because of this. It did not appear that this was included in the planning and development of the workplace learning programme on case study 1, as participants were identified to take part by their grade (the programme was targeted at a particular 'grade' of managers in the organisation) rather than their particular needs. This could be due to the organisational strategy, as explored previously in this chapter, where the programme was chosen to increase the capability of a group of managers, who could then work together on challenging topics in the future, rather than to develop individual skills.

In their research with engineers, Felstead et al. (2009b) noted how individual workers benefited from being part of a productive system that placed considerable emphasis on the nurturing of young talent for the benefit of the overall continuity of practice. This appears to resonate with how participants on case study 2, but not on case study 1, perceived their career structure and development opportunities. As a result, participants in case study 2 displayed a strong sense of confidence in both their current positions in the company and their future careers (Felstead et al., 2009b). However, there is limited consideration in this framework, or in Fuller and Unwin's related Expansive and Restrictive Framework (2004), of the needs of older workers, in relation to both the types of workplace learning opportunities that might be required and the issue of motivating older workers to participate in workplace learning.

As we have seen, previous experience and timing (relating to career and personal factors) appeared to be a key feature of effective workplace learning for participants. Some participants on case study 1 suggested that the particular workplace programme they were undertaking came a little too late in their careers to make a big impact on their performance. Participants on case study 2 noted the need to be able to reflect on their own experience in order to participate fully in the programme, suggesting this would be difficult for less experienced managers. For some participants on case study 2, the programme appeared to be generating the skills and knowledge to undertake their role, for others it appeared to be useful in consolidating experience and providing academic

underpinning to the role they undertook within the organisation. Therefore, although the workplace learning programme is tailored for the organisation, it appears that tailoring it to individual needs seems to be more complicated and difficult to achieve, thus forcing compromises. There is a need to explore the crossover between the programme, the individual learner/worker, and their position within the groups they belong to. Individual differences in the experiences and position in the lifecourse of individual workplace learners need to be recognised and understood in order to ensure workplace learning programmes are flexible enough to counter the potential negative impact of these differences.

6.5 Measures of success

Measures of success were crucial to the perceptions of effectiveness that both the organisations' representatives (the commissioning manager on case study 1 and the learning and development manager on case study 2) and the individual participants had of the programme. From an organisational perspective value for money, return on investment and organisational development were key success criteria. For individual participants, particularly participants from case study 2, more personal criteria, such as career prospects, improved work performance and the way in which the organisation would perceive their work effectiveness, were expressed.

How the effectiveness of the programme would be monitored and measured appeared to have been established by each organisation agreeing indicators of success at the outset. With regard to this the commissioning manager from case study 1 stated: *'We spent a lot of time upfront looking at what the critical success factors would be, how would we evaluate to ensure that we met those critical success factors.'* The commissioning manager did not elaborate on what these were but did indicate that the workplace learner provider was involved in these discussions as well as operational managers from the organisation. This contrasts with data from participants on case study 1, who were not able to articulate the identified critical success factors and who were not aware of any process of monitoring and measuring the effectiveness of the programme. In relation to ongoing monitoring of the effectiveness of the programme, participant 2 on case study 1 stated: *'I think [XXX] is the lead on it ... I think he feeds back to ... the deputy ... but the other monitoring they have done I guess it's through [the facilitator of the programme] ... they've [managers] come in and sat in on the presentations.'* The results of academic assessments were cited as a way in which the effectiveness of the programme could be potentially monitored and measured. These tended to focus on improving aspects of the participant's personal effectiveness or an aspect of their area of work responsibility, and could therefore potentially be perceived as contributing to improved effectiveness in work by both the organisation and the workplace learning participants.

Across case study 1 it was difficult to establish whether the organisation had communicated information about the processes which were being used to monitor and measure effectiveness, or whether the participants had not read or understood these messages correctly. It was also possible that the organisation did not want to share the evaluation process with participants to avoid changing their behaviour towards key measures.

The learning and development manager from case study 2 noted that the organisation had to see direct results from the programme in order to justify the amount of input given by the organisation in terms of time away from the workplace and support from the participants' managers. However, he did not offer further information identifying what these 'results' might look like, although he did comment that changes in behaviour were also sought, an issue which is explored later in this chapter.

Participants from case study 2 identified several informal and formal arrangements that were in place to monitor the effectiveness of the workplace learning programme. These included members of the organisation's learning and development team being present at each workshop and one-to-one feedback sessions between them and participants where behavioural changes as a result of the programme were explored. Participant 8 on case study 2 said: *'[W]e're doing master class presentations every three months or so with the senior management team, we'll present back on what we're doing ... we'll present back*

on a particular topic ... obviously that gives an opportunity, as well as presenting what you've learnt, it's an opportunity for them to see what you've learnt and whether it's relevant and what they expected the programme to be ...'. The learning and development manager's views concurred with this: 'I think that's the way I think we do measure the benefits, short-term it's normally behavioural based, which are different to the person, whether it might be motivational behaviour.' There was an unspoken assumption here that these short-term benefits would lead to longer-term results for the organisation.

Participants on case study 2 also stated that they asked colleagues to complete personal evaluations on them and were being encouraged to do this every three months (this followed an established practice of asking colleagues at different levels, both more junior and senior, to complete feedback questionnaires). This was not an explicit requirement of the workplace learning programme but was assimilated into the programme at the organisation's request. These would have enabled changes in the perceptions of participant's performance and behaviours to be identified; however, it wasn't clear how the results of these were viewed and if they were used to assist the participant's self-evaluation or contributed to the organisation's overall measures of success.

On case study 2, senior managers were copied into assignment results and feedback was given by the workplace learning programme facilitator after every module, and there appeared to be a greater emphasis on this ongoing reporting

compared to case study 1. While participants did not comment on this negatively, there may be others who would find this quite draconian. On the other hand, some might use it as a motivation to increase their grades. Reliance on assignment grades as a method of evaluation is problematic in that results do not tell the 'whole story' of the journey the learner has taken, with learners having differing levels of experience, skills and previous learning experiences/qualifications.

Boud (2001) suggests that workplace learning should include projects related to work which are used to assess that learning outcomes have been met.

Participants across both case studies reported that they were undertaking work-based assessments which, although not referred to as a 'project', often focused on identifying and implementing either personal or organisational change. While these were aligned to work-related tasks they were graded using an academic model of assessment. This can be problematic in workplace learning as participants may undertake work tasks which are very beneficial to the organisation but do not 'score' highly on an academic assessment framework.

These frameworks refer to the inclusion of academic references and critical analysis or reflection as indicators of higher grades. Assessment decisions are based primarily on these 'academic' factors rather than actual work performance. Assignment grades therefore reflected these factors rather than success in actual work tasks related to the assignment that was undertaken. This might leave participants feeling undervalued as their performance is not assessed from the

viewpoint of value to their organisation. My own experience of facilitating workplace learning is that work-based assessments or projects are crucial to perceptions of effectiveness from the organisation, particularly where the focus is on problem solving. Organisations are then able to 'measure' the effectiveness of the workplace learning programme by focusing on the impact and improvements work-based projects or assignments may have engendered. Measuring the effectiveness of learning is complex for both individuals and organisations. Mavin et al. suggest that 'many of the evaluation criteria may be quite specific to individual programmes and their contexts as well as the purpose of the evaluation. It is important that the key stakeholders agree on the evaluation' (2010, p. 11).

My data indicated that some of the suggestions made within assignments were implemented. As participant 7 on case study 2 stated: *'[S]ome of the tasks we've had to take the learning ... into the workplace and evidence how you've done that or what effect it has had on the business and that's your assignment and it's not just an assignment, because two or three of them have actually took whatever methods it was put it into the workplace and then we've seen the benefits of it.'* Prompted by the process of undertaking activities related to assignments, participants made personal or localised changes to work processes and activities. Some participants clearly identified and suggested changes which could impact on the wider organisation. It was clear that not all these suggested changes had been implemented and I was unable to ascertain what rationale

was used to decide which suggestions were and whether this related to how proactive participants were in implementing change, the time they had available or which suggestions the organisation had decided to endorse.

In terms of measuring the effectiveness of the programme once complete, participant 2 on case study 2 suggested that in addition to academic achievement on the programme being measured, promotions that participants achieved following involvement in the programme and retention of participants might also be used to measure its effectiveness. However, most of the participants were unaware of exactly how the programme was being measured, as participant 5 stated: *'No, apart from the fact it will be a case of looking at improved effectiveness but on how they will manage that I'm not entirely sure, apart from the pass and fails.'*

Participants on case study 1 expressed concerns about how the effectiveness of the workplace learning programme would be measured once completed, and suggested that in order to evaluate the effectiveness, there would have needed to be a baseline assessment of the ability of participants at the start of the programme. Participant 1 stated: *'I'm not 100% sure whether that piece of work was undertaken right at the start ...'*. Participant 2 was also vague on how the programme's effectiveness would be measured: *'I would imagine that (1) it will be the fact that we've all passed, (2) they will look at where we've moved forward in the organisation ... I'm guessing they will do some evaluation on it as well ...'*.

Other participants stated that there would be measures in place but were not totally clear about what these would be other than completion of the programme assessments.

Boud et al. (2001) suggest that one of the key characteristics of workplace learning is that learners/workers should undertake an assessment of their current competencies. Participants did not report that individual baseline assessments to ascertain their level of individual competence were undertaken in either organisation prior to the start of the programme, which would make it difficult to use assignment scores as an indicator of success and/or development without knowing the participants starting point. However, it could be argued that since both organisations were looking to equip managers to lead change, it could be difficult to undertake baseline assessment to establish people's current abilities in these areas.

In a review of the literature relating to the evaluation of learning and development in the workplace, Mavin et al. suggest 'training is important and ... the evaluation of it [is] a key issue so that it's "worth" can be proven' (2010, p. 4). They identify the importance of evaluation for the organisation, for individual learners and for the learning facilitators and highlight the need to involve the line manager in evaluation design. The data from this study did not suggest that line managers were being involved in evaluation; however, this may have been happening informally. There is a potential conflict between focusing on the development of

individuals, groups of individuals and the wider organisation within workplace learning programmes (See chapter 2; QAA, 2010; Reeve and Gallacher, 2005). Which of these levels becomes the priority for the programme might well impact on how success is measured. Positive organisational development can be difficult to define and it can be difficult to isolate the factors which might contribute to this or its failure when it isn't achieved. Measures of success are not given much prominence in the literature, possibly due to the differing perspectives and interests of stakeholders as to how to define success in workplace learning programmes. Further work might explore this.

The effectiveness of the programme might therefore be related to whether its purpose and outcome is geared towards developing expertise or innovation. This might also include outcomes which can be impacted on by the nature of the individual participant's role and level of authority and the extent to which they are enabled to develop expertise or be innovative by their individual line manager or the organisation more widely. Additionally, participants' perception of the achievability of these outcomes is likely to differ depending on their personal skills, ambitions and their individual line manager.

As explored earlier in this chapter, organisational strategy drove the selection of a workplace learning programme. However, the link between this and individual goals seemed to be unclear to participants. This, therefore, could make monitoring and measuring of success difficult. Thus the synchronisation of the

programme and work could perhaps have been clearer for the participants and this need for synergy will now be explored further.

6.6 Synchronisation between work and programme

This chapter has considered a range of features of effective workplace learning which emerged from the data. For participants this appeared to encompass: the provider demonstrating an understanding of the organisation and how it worked; a learning programme that was linked to workplace tasks; support from the organisation, for example managers, mentors and colleagues; strong links between the programme and the organisational strategy; and the timing of the programme in the participant's career. These features and the themes explored in Chapter 5 interacted, and reinforced each other, to create the perception of 'effective workplace learning' reported by participants. The following sections will provide a summary of these key features.

Understanding of the organisation and how it worked

There was evidence from across both case studies that a close working relationship had been developed between the employers and workplace learning provider, the result of this being a tailored workplace learning programme aligned to meet the organisation's stated requirements. It is important to note, however, that this was the perception of the participants; the workplace learning provider was not asked to comment as this was not within the scope of the research. Authors and commentators (QAA, 2010; Reeve and Gallacher, 2005) have

pointed to the difficulties in establishing these close relationships and the potentially problematic relationship that can exist between employers and workplace learning providers. Different philosophies can exist between providers and employers as well as differing priorities as explored previously. It would appear, according to the participants, that some of these problematic issues were not present or visible.

This perception of synergy evident in the data from participants in my study, and its contribution to their understanding of effectiveness echoes other studies such as Lange and Dawson's review of several workplace learning partnerships as part of the HEA Demonstrator Projects (2010). One of the key factors which impacts on this synergy in my study appears to be the willingness of the workplace learning provider to adapt the programme to meet the learner's needs. This concurs with Lange and Dawson's findings which stated: 'To assure a quality learning experience, in the work-based learning context, amendments to traditional processes needed to be made, and the participating institutions all showed willingness and innovation in making the required changes, often resulting in examples of good practice' (2010, p. 69).

A learning programme linked to workplace tasks

Most participants stated that the programme needed to be tailored to the organisation in terms of content, learning and organisational outcomes.

Participants also noted that the programme needed to be structured to complement the practices and work patterns of the organisation. However, there was a view that even if the programme was designed specifically to meet the needs of the organisation, it could/should also be tailored for individual needs. Participants felt that that this had not always been achieved and this could have been linked to all participants being managers. There was a disparate and wide-ranging set of roles among the managers who were participating in the programmes. In case study 2, this was particularly apparent as the participants were managing a wider range of operational functions than participants from case study 1. In addition to this, their roles as managers often included a requirement to cope with and bring about change. Therefore tailoring a workplace learning programme to this group might be inherently problematic.

Participants cited the application of learning as a key benefit of workplace learning. There was a view that the learning could be used or implemented more quickly than other learning programmes not linked to the workplace if the key elements of synchronisation indicated in this section were in place. This resonates with Boud's assertion that working and learning are coincident and 'Learning tasks are influenced by nature of work and, in turn, work is influenced by the nature of the learning that occurs. The two are complementary' (2001, p. 34).

The accounts offered by participants also resonated to some extent with the definitions offered by other writers, particularly Gallacher and Reeve (2002) and their suggested four concepts, which have been identified as particularly important in workplace learning. These are:

- 1 Partnership.
- 2 Flexibility.
- 3 Relevance.
- 4 Accreditation.

Of particular importance here are flexibility, partnership and relevance.

Participants across both case studies suggested that an effective partnership between the workplace learning provider and the organisation was important, as was a flexible approach to learning and assessment on the part of the learning provider. Relevance to work was also seen as an important facet of an effective workplace learning programme. Accreditation did not appear to be a particular feature of participants' responses. Boud et al. suggest that workplace learning programmes should 'meet the needs of learners, contribute to the longer-term development of the organisation and are formally accredited as university courses' (2001, p. 4). Therefore, a triangle model of successful relationships within workplace learning appears to be a key aspect of its effectiveness, with the key players being the workplace learner, the organisation and the workplace learning provider. My research indicates that even when the learners are managers, have a considerable investment with the organisation and good relationships had been established within this 'relationship triangle', tensions still

emerge. The organisation's and individual participant's aspirations for workplace learning may differ as well as the perceptions of what each of these stakeholders should contribute towards the successful completion of the programme. The workplace learning provider is party to the perceptions of both of these stakeholders and potentially has to manage the tensions that arise between them.

Support from the organisation

As one participant pointed out, it is complicated to identify 'who' the organisation is. Participants mainly cited their line manager as the representative of the organisation. The main sources of support from the organisation for participants came from colleagues (both participants on the workplace learning programme and other colleagues), managers and, for case study 2, mentors. Neither organisation appeared to have a formal process in place to ensure that each participant was offered a minimum amount of input and support, particularly from their manager, to enable them to fully engage with the programme. The extent and type of line manager support required by participants differed, highlighting the need for a differentiated approach to planning and negotiating organisational support.

For those managers who expressed that they wanted support from their line manager, the 'everyday' support that they required encompassed support with workplace learning programme activities and, additionally, support with managing

their time. Eraut and Hirsh in research with new workers suggest: 'For most workers the main influences of their *line manager* on their learning were through the allocation of work, appraisal, and support for any formal learning requiring fees or time away from the job' (2007, p. 27). As managers themselves, participants in my study had a major role in identifying the work that they undertook. However, they reported the main difficulty of participation in the workplace learning as time; it could be argued that the line manager's role in assisting the (manager) participant with this, or creating a culture where managers have the autonomy to manage their time to enable them to do this, is a key facet of effective workplace learning.

Strong links between the programme and the organisational strategy

Both organisations chose a workplace learning programme because of the close link between learning and workplace activities. There appeared to be an implicit suggestion that this would make the impact of the learning greater, reaping more organisational benefits. The data reinforced this view; however, it also suggested that the learning gained from the workplace learning programme could have been greater had time been allocated to it. Also, although workplace learning may reduce time away from the workplace and potentially reduce costs, any time saved is at the expense of increased workloads for participants.

The organisations had wanted to create 'a go to group' (case study 1) and the senior managers of the future (case study 2). This again concurs with Boud's

assertion that workplace learning should contribute to the longer-term development of the organisation' (2001, p. 4). This places high expectations on workplace learning participants to succeed on the programme and facilitate positive developments within their organisations. These expectations may have increased participants' desire to meet the academic requirements on the programme.

Timing of the programme in the participant's career.

Timing of the workplace learning programme was crucial to perceptions of effectiveness. Within this study this related to the workplace learning programme being too late in some participants' careers, resulting in it not being meaningful, or containing content that the participants have previously explored. Ultimately this affected participants' perceptions of its relevance to their remaining career. This concurs with Eraut's view that the timing of workplace learning impacts on effectiveness and that this differs for individual workers (Eraut et al., 2000). This is of additional significance for managers because they may find it difficult to engage with formal programmes of learning due to time pressures, and therefore be unable to participate in essential learning at the 'right' time. Non-scheduled learning opportunities and learning from colleagues may not offer a solution here either; as Coetzer (2007) points out from her research, middle and senior managers see this type of activity as having lower value.

Demands of workplace learning and time

In common with the other features of effective workplace learning already discussed the demands of workplace learning and having adequate time to undertake the tasks associated with it are interconnected and the most important issues identified by participants. The key issue appears to be that being a manager makes engaging in a workplace learning programme more difficult in terms of allotting time and juggling often competing priorities. This is a complex issue and often relates to the autonomy that individuals feel they should have to organise work to accommodate the demands of the workplace learning programme.

This research has highlighted how the need for synergy is different for middle and senior managers to perhaps other workplace learners. As managers they are both insiders and outsiders to the management structure within their departments. In the eyes of the people they manage, they are responsible for ensuring learning happens, yet when applied to oneself this is much more difficult to achieve. They are the 'face' of the organisation, yet here they are being acted on by the organisation, and are trying to satisfy the organisation by achieving success on the programme and coming up with positive results. Therefore the concept of synergy between work and the programme needs to extend to include how these issues relate to managers in both the design and delivery of workplace learning programmes. Instead of being caught in the middle of the attempts to bring about synergy, and subject to the pressures this creates,

participant managers could be viewed as part of the process of creating and managing that synergy. Thus they become viewed as key people in the process of developing synergy rather than as learners themselves. Active consideration of their complex positioning could reinforce the effectiveness of workplace learning.

These positive and negative features relating to perceptions of effectiveness can, if present, create a synergy of effective workplace learning and perceptions relating to this. However, they also surface complicating factors which require additional organisational considerations when managers are undertaking workplace learning programmes.

6.7 Conclusion

The chapter has presented data from the study to explore the synchronisation between programme, organisation and learners and the impact of this on perceptions of the effectiveness of a workplace learning programme. The two organisations appeared to value the immediacy of the implementation of learning which a workplace learning programme can facilitate. The participants also felt that the programme would contribute to organisational development by creating 'a go to group' of people who could work on organisational challenges. This resonated with participants within case study 2 and their philosophy of 'home grown timber'. Shared learning was a feature of the organisational strategy relating to the workplace learning programme and was valued by some

participants. Conversely some participants pointed to the potentially insular nature of workplace learning.

Previous experience of learning and learning through the lifecourse was considered where the data suggested that the timing of the workplace learning programme, and the participant's perception of its relevance at a particular point in their careers, impacted on their views of effectiveness.

The role of the line manager in supporting managers in their learning is a key issue which contributes to participants' perceptions of effectiveness. This role impacts on several of the features of effective workplace learning identified by participant managers, namely views of time management, learning through the lifecourse, personal circumstances and the sense of autonomy that participants might feel. However, this is complex because unless support requirements are prescribed then line manager support will be variable. However, defining what adequate support 'looks like' would be extremely difficult to do. Participants report a variety of different preferences regarding line management support, which identifies the need for individual negotiations between participants and line managers.

Having 'enough' time to undertake workplace learning is also a key feature of perceptions of effectiveness and the issue of time is both connected to the role of

the line manager and complicated by the participant being a manager. Time is also inextricably linked to autonomy and personal circumstances.

In order bring about these features of workplace learning, and hence achieve a level of synergy which will promote effective workplace learning, the role of the learners as managers need to be acknowledged and actively utilised. They need to be involved in the process of negotiation and development of the programme, an input which is more likely to make this desired synergy attainable.

The final chapter will draw together these themes, reflecting on the whole study, its contribution to knowledge and providing recommendations for practice.

7 Conclusions, Reflections and Recommendations

7.1 Introduction

The aims of the research project as outlined in Chapter 1 were that the results would provide:

- An indication of factors within organisations which might make the implementation of workplace learning more effective. This information could provide a foundation for providers of workplace learning to negotiate programmes which accurately meet the organisation's needs.
- A basis for providers to identify preparatory work which might need to take place within the organisation before a particular workplace learning programme can/should begin.
- A contribution to understanding how organisations which engage in workplace learning differ in the ways they commission, implement and support it.

This final chapter will consider the extent to which these aspirations were met and review the contribution of my study. The research questions for the project will be restated and considered in turn, reviewing how they have been addressed. Claims to new knowledge include increased awareness of the impact of time, particularly on workplace learning participants who are managers, with a much greater emphasis being given to this factor and its intersection with perceptions of effectiveness. This is linked to both their autonomy as managers,

and perceptions of managing, or not managing, time effectively within the workplace. The potential for synergy between the provider and the organisation is explored, and the role of the learner in this process is also considered.

The chapter will conclude by offering recommendations for workplace learning providers, organisations and managers undertaking workplace learning. Finally, I will reflect on the process of undertaking the research.

7.2 Conceptual framework

The conceptual framework identified for the study focused on six key areas. I will consider these in turn taking into account the relevance of the framework following the collection and analysis of data and the impact on my own research.

1 Definitions and context of workplace learning

The literature review highlighted the breadth of activities which can be defined as workplace learning. Sources used included government documents and reports such as The Leitch Report (2006) and authors such as Harris (2006) and Boud et al. (2001). Participants were asked to describe workplace learning and this gleaned a variety of responses. However, a strong theme which concurs, particularly with Boud et al.'s definition (2001), related to the need for workplace learning programmes to be closely linked to participants' work and organisational context.

The growth of workplace learning and the predicted skills shortage (Chapter 2) was not highlighted by individual participants but the former was alluded to by the commissioning manager (case study 1) and learning and development manager (case study 2). Participants suggested that workplace learning might be attractive to employers as it was seen as a cheaper option which puts more responsibility onto individual learners in terms of time. Participants also suggested that workplace learning might require additional or higher levels of skill than more traditional types of learning in areas such as personal effectiveness and time management due to the nature of how this type of learning is organised (including perceived increased level of 'self-study' activities). I would suggest that the literature does not consider these issues in enough detail.

2 Theories relating to how learning occurs

The benefits of shared learning was a common theme from participants across both case studies but more so for participants from case study 1, citing activities such as Action Learning Sets or group problem solving as activities which involved shared learning. These participants also talked about learning from colleagues who were also on the workplace learning programme and colleagues who were not, noting the importance of informal opportunities to share knowledge and learning. Their descriptions of learning resonated with situated learning and communities of practice, as described by Lave and Wenger (1991). Case study 1 had scheduled formal opportunities for this type of learning perhaps because participants in this case study were located geographically closer

together, and were more senior within their organisation. This type of planned shared learning activity appeared to happen less in case study 2. Therefore, for these participants, perhaps less formal structures were adequate. However, the literature surrounding this type of learning says little about opportunities to engage in shared learning based on factors such as location, rank within the organisation and how individual agency and personal circumstances external to the work environment can affect how learning occurs for individual participants undertaking workplace learning programmes.

3 The way organisations enable workplace learning

Fuller and Unwin's Expansive Restrictive Framework (2004) proved a useful theory when analysing the data with regard to how the respective organisations responded to workplace learning, with the data reflecting that both organisations' approaches were more expansive than restrictive. The framework, together with Billett's initial work on affordances, was useful with regard to considering what practices supported workplace learning. However, neither framework enabled me to address the range of factors related to work and outside work that emerged as important to participants, who are managers, a theme which will be considered in further detail below.

4 Informal or non-scheduled learning

Eraut's theories on informal and unplanned learning (2004, 2007) proved useful in that shared learning, usually of an informal nature, was cited by participants

across both case studies as an effective form of workplace learning. However, there are potential problems with the theory as it does not explain in enough detail how differing types of work roles and associated work tasks give some learners more opportunities than others, both between and within organisations, to engage in unplanned learning activities.

5 Individual agency

The theories relating to individual agency, autonomy (Billett, 2000, 2001, 2002, 2004, 2008) and learning through the lifecourse (Bimrose and Brown, 2009) became more important as the analysis of the data progressed. The way in which organisations support their employees to engage in workplace learning is considered by Billett but my own data suggests that this does not provide a full enough picture of the nuances which can impact on engagement. Further consideration needs to be given to more subtle areas such as the perceived licence organisations give to workers to manage their time to meet the demands of the workplace learning programme. Autonomy can have both positive and negative consequences on workplace learners, as discussed in Chapters 5 and 6, which I do not believe is given enough consideration. Learning through the lifecourse and the work of Bimrose and Brown was useful in considering the differing motivations of older workers. This was particularly useful with regard to case study 1, where participants highlighted issues regarding their learning and development in the later stages of their careers.

6 Organisational culture and the impact of this on the effectiveness of workplace learning.

Although the work of Bishop et al. (2006) on learning organisations and Schein's work on organisational culture/types (2010) were useful, neither contributed as clearly to the data analysis as other theories, for example Billett and Fuller and Unwin. Initially, following the initial interviews for case study 1, I thought organisational competence and capability and the work of Berman Brown and McCartney (2003) might become a stronger theme as this was mentioned or alluded to by participants. However, as the interviews progressed it appeared to have a more limited resonance for participants.

The literature, although useful when considering workplace learning generally, was limited in relation to managers as workplace learning participants. There is very little written about this group and the issues which have been surfaced within this study.

7.3 Research questions and how these were addressed

I will now consider the research questions, highlighting if and how these questions have been addressed through undertaking the research.

- 1 In what ways is workplace learning perceived as effective or not effective by employers and employees?

Participants highlighted a range of ways in which workplace learning was viewed as effective and these appeared to be subdivided into what the organisation would see as effective and what the learner's personal aspirations were.

The development managers from both case studies focused on the goal of organisational development, citing the ability to cope with change.

They were, in different ways in the two cases, looking for a group of individuals who could drive forward that change and achieve new projects or initiatives. Part of this would be through changes in the performance of individuals on the course, and their ability to instigate and manage positive organisational changes. A crucial aim was to develop enough managers who could make these changes happen, that is, a critical mass of 'go to' managers.

Some participants were aware of this organisational strategy and their organisation's focus on developing a 'go to group'. However, this wasn't universally understood by all participants with pockets of uncertainty regarding their organisation's view of what an effective workplace learning programme would 'look like'. This uncertainty was, in some way, surprising as all participants were managers and therefore one might expect that they would be involved in discussions or be aware of organisational strategy.

Participants' perceptions of the cohesion between the workplace learning programme content and the work tasks they undertook influenced understanding of effectiveness. The 'closer the fit', the more effective it was considered to be.

These views of effectiveness were linked to perceptions of how easy participants found the application of programme content and activities to their work. The utility of their learning appeared to be a key aspect of their understanding of programme effectiveness. Being manager participants appeared to add a further dimension, as there were strong expectations (either from the organisation or self-imposed) that learning should be evidenced through it being easily implemented.

Some participants suggested that the alignment of the workplace learning content to their work role and tasks was not close enough, resulting in a perception of the programme being less effective. This points to the difficulties of tailoring the programme to a diverse group of individual managers while maintaining the whole group.

Although some participants were aware of their organisation's objectives for the programme, participants also highlighted their personal motivations for participating and this in turn impacted on their perception of what effective workplace learning would look like and whether it met their individual needs and requirements. Personal motivations included advancement within their organisation and gaining a recognised qualification. These personal motivations seemed to be influenced by the participant's position in the lifecourse and, in some cases, their personal circumstances and family responsibilities.

There is potential tension here for participant managers who are balancing their own and their organisation's objectives for the programme, resulting in different definitions of effectiveness. This can be particularly difficult because as managers their role does involve some personal alignment to their organisation and there is an expectation that they will 'buy into' their organisation's goals and aspirations.

Ultimately the responsibility for succeeding on the workplace learning programme is generally perceived to sit with individual participants. However, as middle and senior managers there was 'double' pressure to succeed from both their organisation and themselves.

This subsequently impacts on what effectiveness looks like for the stakeholders within the workplace learning programme. Potentially for the organisations effectiveness might mean having more knowledgeable or skilled workers, it might also mean a manager who is able to increase their performance, deal with change or increase the business of their organisation. If organisational views of effectiveness are the only measure for the programme it leads to tension, since learners will need some meaningful reward, given the commitment of their own time and the pressure they are put under while participating.

Few participants had a clear understanding of how their organisation might gather evidence on the success (or otherwise) of the programme, other than by

sitting in on some of the sessions and through 'sharing up' of learning.

Participants felt that ultimately measures of success focused on them as individuals and their progress against assignments. Although some expressed the view that promotion might be another indicator.

Support for the process of learning was also a key contributor to participants' understanding of effectiveness. Here the main influencing factor was line manager support, and the extent of cohesion between the support needs of the participants and what was on offer from their manager. The agency of learners in shaping this support is a key finding. Where this cohesion wasn't present, some participants had an unmet need for support, which impacted on their perception of the effectiveness of the workplace learning programme. There may have been assumptions that as managers they needed less support or would ask for the support they required. There was a (possibly self-imposed) perception that as managers they should be self-sufficient and should not need as much support as less senior employees.

Middle and senior managers make a key contribution to the organisations they work in and a lot is expected of them. Undertaking a workplace learning programme appeared to increase these expectations and for already busy managers this resulted in increased pressure. Successful completion of workplace learning programmes appears to be even more important for

managers, who felt it would impact on perceptions of their general workplace capabilities.

2 What are the features of organisations which impact on this perception of effectiveness and non-effectiveness?

This question was attempting to find out what organisational features contributed to and impacted upon how effective workplace learning was perceived by both participants engaging with the programme and managers within the case studies. However, on reflection it would appear that this question was a little simplistic as it did not take account of non-organisational features, such as personal circumstances, or the more subtle organisational influences which impact on perceptions of effective workplace learning.

The main feature which impacted on participants' perceptions of effectiveness was time. Workplace learning appeared to place more demands on participants than more traditional learning programmes that take place away from the workplace. This was made even more difficult for participants who are managers as they already had a heavy workload, which according to this study was not decreased to accommodate a workplace learning programme. Additionally, as part of their role the managers were expected to manage their own time, including on the programme, whereas less senior workers are often supported to manage their time or their time is managed for them. There are expectations that managers do not require this type of support and time management is solely their

responsibility (and not shared with their line manager), whereas it is clear that some do require support.

Participants reported undertaking some of their studies in work time, meaning that they had to accommodate this into their already busy schedule; however, for many it was more likely that activities such as assignment writing were undertaken in their personal time. Many managers undertake work tasks in their own time already so workplace learning activities added to this and expanded the personal time they needed to put aside to meet the overall demands of work.

The organisations appeared to accept that time was required for the participants to attend 'formal' sessions but did not have arrangements in place to provide time for informal learning and reflection, which was viewed as part of effective learning. Participants recognised the value of the latter, expressing frustration at its marginalisation.

Manager participants often had a perception that their organisation assumed that time could be managed to accommodate all of their responsibilities, including activities associated with workplace learning. However, some participants felt there was not enough time and most struggled to meet this expectation. It is therefore important to recognise the position of managers as (somewhat) autonomous workers, over content/process of work and time.

Workplace learners who are managers also appeared to have varying levels of autonomy to manage their time. This perceived or actual autonomy was dependent on their previous experience, their role (for example the need to be 'on duty') and their line manager. Some managers did not perceive that they could take time away from the workplace to complete assignments and therefore often did not request this from their line manager. Other participant managers did ask for this, and some felt that they didn't need to do so as they managed their own time.

Shared learning was a significant feature which contributed to perceptions of effectiveness for some managers who are workplace learners. However, access to these shared learning opportunities between colleagues outside of the scheduled workshops was variable depending on the manager participant's location, work role and work pattern. This meant some managers were not able to access the full range of learning opportunities associated with the workplace learning programme, potentially resulting in a less rich experience.

For some workplace learning participants who are managers the insular nature of workplace learning was problematic as perspectives from people outside the organisation were seen as valuable with the prospect of fostering innovation. The potential for 'group think' and lack of alternative perspectives, therefore, could be a negative consequence of shared learning.

Workplace learners who are managers actively contribute additional opportunities to enhance workplace learning programmes and increase its effectiveness. However, this presents them with multiple pressures. While time for workplace learning is difficult to organise, having autonomy, holding it all together, and being judged on succeeding can leave managers in a vulnerable place.

3 What organisational practices might influence the effectiveness of workplace learning?

Although both case study organisations had put some processes or activities in place to support the workplace learning programme, there were underlying nuances which appeared to influence the way in which individual participants would engage with these.

Within this study, both organisations appeared to have developed a good relationship with the workplace learning provider. A significant amount of time appeared to have been spent on planning the workplace learning programme at the start, and this development was ongoing. This appeared to impact positively on the participants' perceptions of its effectiveness and contributed to a degree of synergy between the programme and the workplace. However, it appeared that, in relation to the planning phase and the ongoing direction of the programme, the participants themselves felt separate from this relationship.

Participants expressed different expectations and experiences regarding support from the organisation, and the extent to which this support met their expectations impacted on their perceptions of effectiveness. There were wide variations in the participants' views on the effectiveness of the support they received from their line managers. Neither organisation took a strong line on mandating the role of the line managers and it appeared that the nature of support required was not always discussed.

Manager participants from case study 2 welcomed the 'safe space' that having a mentor provided to express views that they might not feel able to express to their line managers. However, the role of their mentors was not always clear to participants and it appeared that the focus of their meetings was closely assigned to programme content, and did not extend to managing its demands.

As mentioned previously there were some opportunities for shared learning outside of the facilitated learning sessions. However, it appeared that the organisations' processes for how access to these would be distributed to all participants had not been thought through. This impacted on the perception of effectiveness held by those who felt that they were unable to engage with these opportunities and who felt that they might have been beneficial.

It was unclear how the activities associated with the programme linked to the process of objective setting for individual participants. Some saw this as an

opportunity to link achievement of projects to individual appraisals. In the absence of a formal process of, or discussion around, ways of judging individual success on the programme, participants formed the view, as mentioned previously, that success was measured on their individual assignment results and passing the course overall. This is problematic as successful completion of assignments can be linked to time, and if time is lacking to write an assignment this is likely to result in a less favourable mark. Additionally, the assignments were academic. Therefore those managers who either had previous academic experience or had good academic skills were placed at an advantage to those who did not possess these. Therefore, if assignments are used as a measure of the individual effectiveness of workplace learning, previous academic experience and/or academic skills possibly skew this as a measurement. An overtly negative assessment on the course might impact on how their performance is viewed at work.

Organisational practices and processes to support workplace learning, and influence its effectiveness, had some positive and negative impacts. However, these processes did not take account of the diversity of the manager participants' support requirements, experience and particular job roles and associated activities.

7.4 Claim to new knowledge

My claim to new knowledge, which has been surfaced by this research, encompasses the following key areas:

Time

Across both case studies, the factor which participants referred to as having the biggest impact on their perception of the effectiveness of workplace learning was time. The issue of time being a significant issue for workplace learners is not new. However, the issue of how a workplace learning programme is accommodated into a manager's workload (and in some cases personal life) has not emerged previously and has been surfaced by this research.

Participants report this as being the major factor which influences their perceptions of effectiveness and performance on workplace learning programmes. The organisations involved in the study had invested heavily in workplace learning, and to therefore not consider this issue of time, particularly as it relates to managers, was potentially a limiting factor. However, with the differing support requirements which would be found in a cohort of workplace learners, establishing how much time is adequate would be problematic.

The ability to assimilate the demands of a workplace learning programme into the manager's schedules can vary tremendously and is dependent upon a number of

factors including particular job role, personal circumstances, time management skills and experience in both their work role and in previous learning.

More experienced managers appear to perceive managing their time as part of their job and the work relating to the workplace learning programme will get done, one way or the other. Junior managers report feeling a little overwhelmed by the requirements of the programme but see it as their responsibility to find a way of resolving this, usually through undertaking workplace learning activities in their own time. This view seemed to be particularly pertinent to the participants in this study, who were all managers, as it might be assumed that they possessed the ability to do this.

Therefore, time and the importance of how this is negotiated for participant managers undertaking workplace learning provides a new aspect to previous discussion in this subject area.

Autonomy

Perceptions of time are inextricably linked to autonomy for participant managers. Who has the autonomy and ability to manage their time and therefore manage engagement with the workplace learning programme is another issue arising from the data. Having autonomy is generally seen as being a positive attribute; however, this places the responsibility for managing time onto the manager participants, and takes it away from their line managers. Workers who are positioned lower in the hierarchy may not have autonomy to manage their time,

but will have managers who have the responsibility to organise study leave for them. This potentially gives more 'protected' learning time to those workers.

Role of the line manager

The role of the participant manager's line manager is interlinked with the issues of time and autonomy as discussed previously. This is also an area not considered in previous research relating to managers as workplace learners.

This study established that the relationship between a manager participant and their own line manager and the line manager's approach to supporting workplace learning was pivotal to participants' perceptions of effectiveness. Crucially, for participants their manager 'is' the organisation and perceptions of how supportive the *organisation* was of their engagement in the programme were strongly linked to their perception of the support they were given or autonomy they were afforded to manage their engagement.

Participants' expectations and requirements of their line manager differ, with some requiring support with certain activities related to the programme such as guidance on writing assignments. Others wanted more practical support such as being given time away from the workplace to undertake workplace learning activities. Others suggested that they didn't require support, but were satisfied they could ask for support on an ad hoc basis if required. This suggests that line manager support needs to be established on an individual basis and, from the organisation's perspective; minimum levels of support need to be defined and

offered. Additionally, having an organisational process which lays down minimum levels of support from line managers would be useful, although it would need not to be prohibitive so as to take account of those manager participants who do not feel that they require a high level of line manager support.

The pressures for managers undertaking workplace learning

For managers, workplace learning is different to other forms of part-time and flexible learning in that finding the demands of a workplace learning programme overwhelming can be seen as a failure on their part.

Therefore, potentially there is more at stake for managers if they were to fail the programme as it would impact on their perceived credibility at work. This, therefore, places more pressure on participants who are managers on workplace learning programmes than non-managers. However, no suggestions were made by participants in this study that there were definite negative consequences attached to not succeeding on the programme nor had the organisation implied this. It appeared that this concern was often self-imposed, which made participants strive harder to succeed.

This 'fear of failure' potentially adds further stress and pressure for managers, who are likely to be under a lot of pressure already due to their job roles.

Previous research and uniqueness of this research

Previous research and policy has tended to focus on the needs of employers and HEIs rather than workplace learners. As mentioned in Chapter 1, the Leitch Report noted in that 'The Review recommends widening the focus of HE targets to encompass both young people and adults via workplace delivery. This will dramatically improve engagement between HE and employers' (Leitch, 2006, p. 140). The workplace learner is notably absent from this partnership. Later research, for example, the HEA Demonstrator Projects (Tallantyre, 2010b) considered case studies of workplace learners; however, the research did not gather data from learners as managers in relation to perceptions of effectiveness; instead there was a greater focus on organisational perspectives. Very little work has been done on this area and there are limited studies into this group of workplace learners. Researchers have explored the issues of managers and time separately but not linked them together. Practice research has focused more on unpacking issues around the areas of organisation and relationships. The research detailed in this thesis focused on managers as workplace learners and their perceptions of effectiveness, which has therefore offered a unique dimension to the debate and considered these conjoined areas in greater detail.

Managers who are workplace learners are unique not only in their skills, abilities and experience at work but also in the particular management role they undertake and their personal circumstances. Whether workplace learning

programmes can cater for these individual needs requires further consideration or at least appreciation.

Greater involvement by the manager participants in the planning and monitoring of the workplace learning programme would enhance perceptions of effectiveness. This would potentially lead to greater rewards for the organisation and make their aspiration of creating a 'go to group' more achievable.

Having undertaken this research, when I view the situation for managers my position indicates that workplace learning is experienced differently by them because the pressures of their job roles are different. Therefore a different approach to planning and delivering workplace learning is required.

7.5 Wider implications

Although the research was focused on workplace learning and higher education, the findings may have some relevance to providers of related forms of learning. Many providers of education offer part-time opportunities where family commitments, work and other responsibilities often impact on the learner's capability to undertake their studies. There is evidence to suggest that part-time, mature learners require more support than traditional types of learners, particularly in relation to confidence and managing time. In a small-scale research project with mature learners undertaking a part-time foundation degree, Fenge (2011) highlighted the difficulties that part-time learners may face in terms

of completing their learning programme. She noted that 'Most of the students interviewed felt that they needed extra support' and that 'There was a perception amongst the students interviewed that a loss of confidence and finding the FD overwhelming contributed to high attrition rates in the first year'(Fenge, 2011, p. 385). This, as well as the data collected, suggests that further consideration needs to be given to the support required by workplace learners.

7.6 Recommendations

The findings of this research suggest that strong relationships between HEIs providing workplace learning programmes, organisations and individual managers undertaking workplace learning can improve the perceptions of effectiveness. This view is promoted by my analysis of their position as managers and how their involvement in the planning stage would have enabled the higher education provider and the organisation to consider the synergy and implementation of the programme from the manager participant's perspective. It is possible that managers who are new to workplace learning may find it difficult to contribute to the planning of the programme or possibly at the negotiation stage participants may not have been identified. However, they could at least contribute their understanding of the context of workplace learning and the potential impact of it on their work role and duties. In planning for subsequent cohorts previous workplace learning participants could be involved in discussions and the overall negotiations, in order to harness their experience at an earlier stage. Once under way, managers who are undertaking workplace learning

programmes could contribute to the ongoing direction and progress of the programmes by providing regular feedback via a steering group with representatives from their cohort.

Negotiations regarding workplace learning programmes between stakeholders should encompass a much wider area. The organisation's approach to workplace learning, workplace and organisational culture and usual practices of line manager support need to be significant considerations when designing an effective workplace learning programme.

With further work a set of critical discussion questions could be developed to assist stakeholders in the workplace learning partnership when negotiating and planning a workplace learning programme. This would enable the learning provider, organisation and participants to design the workplace learning programme around the particular nuances and features of the organisation.

Potential critical discussion questions could include:

'What is the programme intended to achieve for both the organisation and individual learners?'

'How will competing demands from immediate ongoing work and programme work be managed and by whom?'

'What support will the organisation provide for managers undertaking the programme?'

'Will the line manager have a role in supporting the participant manager? If so what will this role entail and how will it be negotiated between both parties?'

'How will the effectiveness of the programme be monitored and measured? Who will be involved in this?'

'How will aims and measures of effectiveness be shared with managers who are participating on the programme, and will achievements on the programme feed into processes of staff review?'

'How will access to formal and informal learning opportunities associated with the workplace learning programme be distributed between participants? Are there potential participants who, due to their particular role, previous learning experiences, location and personal circumstances may need additional support arrangements to fully participate?'

These questions would be in addition to questions about content, duration, target group and delivery methods, which one might expect would be discussed in negotiations about workplace learning. The need for questions such as these

arises from the confusion expressed across the case studies about organisational intentions and in particular how the implementation and success of the workplace learning programme would be monitored and measured. They also address the participants' assertions regarding the competing demands of the 'day job' and workplace learning.

It is important for stakeholders in the workplace learning partnership to be mindful of the differences which relate to manager participants compared to other workplace learning participants who do not have management responsibilities and design workplace learning programmes differently in order to ensure their unique support and learning requirements are met.

Considerations for particular stakeholders are as follows:

Organisations

How time will be managed for and by manager participants within the organisation requires consideration in order to ensure maximum return on the investment of the workplace learning programme. Consideration is often given to the allocation of study days where workplace learning programmes require participants to engage in activities in non-scheduled time (that is outside of planned workshops). However, what is more complex is ensuring that managers do not deprioritise these days for other workplace priorities. Manager participants need to be supported to take these opportunities by the organisation, for example

by developing strategies to cover the manager's work (commonly referred to as 'backfill'). This would need further consideration by each organisation.

Organisations need to strike a balance between enabling manager participants to manage their own time and ensuring that they do not feel overloaded. Not having enough work time to complete the activities associated with workplace learning can result in them not being able to participate fully in the programme or having to increase their working hours dramatically in order to accommodate the programme into their work role.

Organisations could consider the use of learning contracts between participant managers and their line managers which allow for support to be given by the line managers, dependent on the level and type of support the participant requires. Monitoring learning contracts would enable organisations to identify manager participants who are not getting enough support and, over time, to establish the range of support that most participants require and then set this as a minimum requirement. This, however, requires careful consideration as such contracts could add a layer of rigidity, particularly for those manager participants who do not require support, and a lack of flexibility into the support offered and received.

Higher education providers

Higher education providers need to be mindful of the differences which arise when learners are also managers and ensure their unique support requirements are met. Therefore, potentially more time needs to be allocated to negotiating

workplace learning with stakeholders and a deeper exploration of the organisational context is required. As providers of workplace learning, higher education institutions would have a role in ensuring that the questions suggested earlier are discussed and negotiated.

A flexible approach in relation to delivery (and potentially assessment) which acknowledges the context that participant managers are working in is crucial to effective workplace learning.

Workplace learners

Workplace learners should take an active role in establishing individual levels of support required from the organisation and line managers and should be encouraged to establish this at the start of a workplace learning programme. As mentioned previously, they should also be encouraged to be involved in the planning of workplace learning and provide regular feedback to the organisation on its implementation.

Prospective workplace learners should be encouraged to find out as much about the workplace learning programme as possible to ensure that they are aware of the requirements and additional work required. Organisations could helpfully support this by providing a 'readiness for workplace learning' questionnaire or perhaps by asking participants to undertake some workplace learning activities as a 'taster' opportunity prior to application.

7.7 Future work

The issue of time to engage in workplace learning was a key finding in this research. This had different dimensions including how much support the organisations gave to participants to undertake the activities associated with the workplace learning programme and how much autonomy participants felt they had to manage their time to meet the associated learning activities. Further research is required in this area to establish how workplace learning can be best supported by the learning provider and organisation in a range of contexts. It would be interesting to undertake further research to see how perceptions of time management and effective workplace learning differ throughout the hierarchy of organisations. The dimension of informal or non scheduled learning in the workplace, as it relates to managers, could also be a useful aspect of this. Another valuable avenue for research would be to investigate which aspects of workplace learning are most easily implemented in the workplace and what processes would support this.

Surprisingly, there was a lack of focus on making judgements on the effectiveness or success of workplace learning, or if looked at narrowly, 'measuring' the effectiveness. The perceptions from most participants were that assignment grades and progress on the course were the main indicators. Therefore, further research into how organisations judge the effectiveness of

workplace learning, perhaps identifying a wider range of measures, could be fruitful.

7.8 Final reflection on my learning

My role as an 'insider' (Bonner and Tolhurst, 2002) in workplace learning enabled me to have a good understanding of the type of workplace learning programmes that participants were undertaking and the issues participants potentially face in combining work and study. When I started the research I was employed full time by the higher education learning provider. However, my role changed between conducting the interviews on case study 1 and case study 2 and I had less of a direct role, working as a consultant for the provider on an ad hoc basis. As this role involves less work with organisations, I was able to put some distance between it and my close relationship to workplace learning; this, I believe, gave me a more impartial perspective. When undertaking the interviews with participants from case study 2, some were keen to ascertain my connection with the higher education provider. I felt that when I told them that I had a less direct role, they explained the programme to me in more detail, which enabled me to gain a deeper insight into their individual descriptions and explanations of their workplace learning programme.

I felt that I was able to be more objective in this new role as I did not automatically view the data from the perspective of a provider and designer of workplace learning. As I was no longer a stakeholder in the workplace learning

relationship, I was able to see the data through multiple lenses and see all the perspectives offered to me by the data. On reflection, I still, however, perceive myself as being somewhat of an 'insider' (Bonner and Tolhurst, 2002) to the research as I have some understanding of the research group's culture and was able to interact easily with the participants. However, as I did not know the participants, I did not have a previously established intimacy with them (Bonner and Tolhurst, 2002). Therefore, my position was probably, as discussed in Chapter 3, more akin to being a 'researcher in the middle' (Breen, 2007).

I believe I gained a greater understanding of each of the workplaces due to using case studies rather than if I had interviewed individual learners from a variety of different organisations. This enabled me to build up 'a picture' of the practices, 'affordances' (Billett, 2002) and culture within each organisation and get an overall deeper understanding of the context that participants were working and learning in. I was able to identify commonalities raised by participants within their organisations, which, on reflection, made it easier to identify themes.

Prior to undertaking the research I had observed how workplace learning was experienced differently depending on the participant's role. However, I had not considered the additional complexities of how managers experience workplace learning programmes. In this context, successful completion of workplace learning is linked to overall (self and organisational) perceptions of a manager's effectiveness. This has made me reflect on my own context of working in a

university and undertaking this EdD and how completion will also affect the perceptions of my overall capability as an academic.

The importance of the role of the line manager in supporting workplace learners who are also managers was particularly striking. This echoes Eraut's assertion that the line manager can enhance learning in the workplace (2004, 2007).

Analysing the data I was, however, surprised at the extent that the impact of time and line manager support and approach had on perceptions of effectiveness.

Also, I had not previously considered the impact of being a workplace learner/manager and how this can influence the experiences, outcomes and perceptions of workplace learning. This was highlighted during my reflections from one of the interviews (see extract from learning journal, Appendix 6) where a participant told me about an emergency situation involving a worker who had not followed protocol but lives were saved. What was particularly striking was the way in which this particular manager chose to deal with this situation, that is, use it as a vehicle for learning and share it across work sites. He noted that other managers may have had a different view and taken more punitive action as protocol wasn't followed. This underlined the crucial role the manager has in developing a learning supportive culture and how one's manager's own approach to learning at work will have a significant influence over their own experiences of workplace learning. This insight has led me to a far greater understanding of this and I have incorporated what I have learnt when providing CPD opportunities for learners who are managers undertaking work-related learning.

I enjoyed the process of undertaking the interviews and learnt a lot about research interviewing which I will use in the future. Analysing the data collected took much longer than I anticipated and therefore this was a further learning point for me. I found undertaking the research difficult to fit in with other commitments and could certainly empathise with the learners I interviewed in terms of how this impacted on other areas of one's life. On reflecting on my research journal, I can see that there were points where I could have managed my time better and underestimated how long some activities would take to complete, for example data analysis, as discussed above, and writing up.

I have changed my approaches to workplace learning in relation to designing and teaching and now try to consider individual perspectives and build more flexibility into programmes where possible. When working with manager participants, I would certainly advise different approaches to take account of the uniqueness of this role and how this intersects with being a workplace learning participant.

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Appendices

- 1 Schedule: Manager Questions
- 2 Schedule: Learners' Questions
- 3 Information Sheet for Organisations
- 4 Information Sheet for Potential Participants
- 5 Consent Form
- 6 Extracts from Reflective Journal
- 7 Excerpt from an Analysed Transcript

Appendix 1 - SCHEDULE FOR RESEARCH INTERVIEWS (MAIN STUDY - Managers)

- Explanation of the format of the interview e.g. length of interview, questions, interview being recorded etc.
- Confidentiality and how information will be shared
- Ability to withdraw and can refuse to answer particular questions
- Can share any issues raised during the interview with [name of learning provider], with participants permission
- Ask participant to confirm consent for the recording and complete consent form

Research Questions	Questions
Context Setting Questions	1. Would you mind starting by telling me about your role here at XXX?
	2. Within your role, what responsibilities or authority do you have for learning and development? E.g. commissioning, organising, supporting, implementation etc.
	3. What is your definition of workplace learning? Follow up: What types of learning do you associate with workplace learning?
1. In what ways is workplace learning perceived as effective or not effective by employers and employees?	4. What were the factors which led you to choose a workplace learning programme rather than a more traditional learning and development programme? Follow up: What expectations does the organisation have of workplace learning?
	5. What do you see as being the benefits of workplace learning? (if not covered already)
	4. What do you see as being potential drawbacks of work place learning?

Research Questions	Questions
1. In what ways is workplace learning perceived as effective or not effective by employers and employees? continued	5. What would your organisation see as being indicators of an effective workplace learning programme?
	6. Does your organisation monitor the effectiveness of workplace learning programmes? Follow up: if so how?
2. What are the features of organisations which impact on this perception of effectiveness and non-effectiveness?	7. What is the culture of learning and development within your organisation (projected/perceived/actual)? (i.e. Billet - affordances, Unwin and Fuller - expansive and restrictive framework)
	8. What are the reactions of employees when they are asked to engage in workplace learning activities?
	9. Do learners perceive any benefits to undertaking workplace learning programmes? Follow up: If yes, what are these? Why?
	10. Do learners perceive any disadvantages to undertaking workplace learning programmes? Follow up: If yes, what are these? Why?
	11. How is access to learning programmes perceived by learners e.g. as a benefit, to improve skills, something they are required to do etc.?
	12. Are there activities that the organisation undertakes to support workplace learning during the programme?
	13. Are there activities that the organisation undertakes to support workplace learning applying learning once the programme has been completed?

Research Questions	Questions
3. What organisational practices might influence the effectiveness of workplace learning?	14. How does the organisation influence the workplace learning programme? How does it contribute? E.g. learner support Follow up: Why it is operating in this particular way?
	15. Does the way in which work is organised (e.g. workers roles, authority to manage own time, reactive, proactive, process role etc.) influence the effectiveness of workplace learning programmes? E.g. expansive/restrictive, affordances
	16. Are there any (additional) systems and processes which influence the effectiveness of workplace learning? 17. Prompts: HR policies, etc.
	18. Does the learners' manager influence the effectiveness of workplace learning? Follow up: How?
	19. Do the learners' colleagues or other people within the organisation impact as above on the effectiveness of workplace learning? Follow up: How?
	20. Is (other) support offered to the learner? Follow up: Can you give me some examples?
	21. Are there any features of the organisations which restrict the effectiveness of workplace learning? (expansive and restrictive framework) Follow on: Can you give me some examples of these
	22. What can/could the organisation do to make workplace learning more effective? Probe: barriers to changing things (e.g. parent company policy, lack of funding etc.)

Research Questions	Questions
Closing Questions	23. Do you have any further comments you would like to add?
	24. Are there any issues which you would like me to feedback to [name of learning provider]? Reminding them that unless they explicitly say that they want me to, confidentiality remains preserved
Ending the Interview	
<ul style="list-style-type: none"> • Thank person for participating in the interview • Tell people how to withdraw from the project • Explain that the report will be submitted in September/October 2012 • Offer to send participant a copy of the transcript of their interview • Offer to send participant a summary of the final report • Confirm that copy of consent form will be forwarded to them 	

Appendix 2 - SCHEDULE FOR RESEARCH INTERVIEWS (MAIN STUDY - Learners)

- Explanation of the format of the interview e.g. length of interview, questions, interview being recorded etc.
- Confidentiality and how information will be shared
- Ability to withdraw and can refuse to answer particular questions
- Can share any issues raised during the interview with [name of learning provider], with participants permission
- Ask participant to confirm consent for the recording and complete consent form

Research Questions	Questions
Context Setting Questions	1. Would you mind starting by telling me about your role here at XXX?
	2. What workplace learning programme you are undertaking?
	3. Did you choose to undertake the workplace learning programme? Follow up: If yes, What were the factors which led you to choose a workplace learning programme rather than another form of learning and development programme?
	4. What types of learning do you associate with workplace learning?

Research Questions	Questions
1. In what ways is workplace learning perceived as effective or not effective by employers and employees? continued	5. Do you see any benefits of participating in a workplace learning course? compared to more traditional forms of learning? Follow up: If yes, what are these? If no, why might this be?
	6. What do you see as being potential drawbacks of work place learning?
	7. What do you think the features of effective workplace learning are? Follow up: Can you give me some examples?
	8. What expectations does the organisation have of workplace learning?
	9. What are your organisations expectations for what it will get out of you doing a work place learning programme?
	10. How does your organisation monitor the effectiveness of workplace learning programmes?
	11. How does your organisation measure the effectiveness of workplace learning programmes?
2. What are the features of organisations which impact on this perception of effectiveness and non-effectiveness?	12. In what ways does your organisation make it easy or hard for its employees to engage in work place learning?
	13. How did you feel about engaging in workplace learning activity?
	14. How do you perceive access to learning programmes e.g. as a benefit, to improve skills, something you are required to do etc.?

Research Questions	Questions
	15. Are there activities that the organisation undertakes to support you in participating in the workplace learning programme in relation to physically engaging in the learning activities?
3. What organisational practices might influence the effectiveness of workplace learning?	16. Are there activities that the organisation undertakes to support you in applying learning once learning tasks have been completed?
	17. How does the organisation influence the workplace learning programme? How does it contribute? Follow up: Can you think of an example of your workplace learning and how the organisation influenced this?
	18. Does the way in which your work and that of your colleagues is organised (e.g. workers roles, authority to manage own time, reactive, proactive, process role etc.) influence the effectiveness of workplace learning programmes?
	19. Are there any (additional) systems and processes within the organisation which influence the effectiveness of workplace learning? Follow up: Can you give me some examples?
	20. Does your manager influence the effectiveness of workplace learning? Follow up: How?
	21. Do your colleagues or other people within the organisation influence the effectiveness of your workplace learning? Follow up: How?
	22. Is (other) support offered to you? Follow up: Can you give me some examples?

Research Questions	Questions
	<p>23. Are there any features of the organisations which restrict the effectiveness of your workplace learning programme? Follow up: Can you give me some examples of these</p>
	<p>24. What could be done to make workplace learning more effective? E.g. you , manager, team, organisation</p>
Closing Questions	<p>25. Do you have any further comments you would like to add?</p>
	<p>26. Are there any issues which you would like me to feedback to [name of learning provider]?</p> <p>Reminding them that unless they explicitly say that they want me to, confidentiality remains preserved</p>
Ending the Interview	
<ul style="list-style-type: none"> • Thank person for participating in the interview • Tell people how to withdraw from the project • Explain that the report will be submitted in September/October 2012 • Offer to send participant a copy of the transcript of their interview • Offer to send participant a summary of the final report • Confirm that a copy of the consent form will be forwarded to them 	

Appendix 3 - Information Sheet for Organisations

Research Project Title: Workplace Learning and Organisational Culture: Improving the workforce from within

What is the research about?

The research project will explore the context and effectiveness of workplace learning. It will focus on how specific organisational cultures influence the implementation, integration and impact of workplace learning programmes.

Who is undertaking the research?

Christina Palmer will be undertaking the research as part of an Open University Doctorate in Education programme. Christina works as a consultant for [name of learning provider] which is a wholly owned subsidiary of XXX University.

The research supervisor is Dr Fiona Reeve from the Open University and participants may contact Fiona if they wish to talk to someone else about the research. Her contact details are as follows: Dr Fiona Reeve, Faculty of Education and Language Studies, Floor 2, Stuart Hall Building, Open University, Walton Hall, Milton Keynes, MK7 6AA. Tel: 01908 659066 email: F.J.Reeve@open.ac.uk

What are the research questions?

1. In what ways is workplace learning perceived as effective or not effective by employers and employees?
2. What are the features of organisations which impact on this perception of effectiveness and non-effectiveness?
3. What organisational practices might influence the effectiveness of workplace learning?

What will participating in the research project involve?

You have been invited to be involved in the research as employees from your organisation have undertaken or are currently undertaking a, [name of learning provider] workplace learning programme. If you feel that your organisation would be willing to be involved in the research, you will be asked to circulate an information sheet to those people who have or are undertaking the [name of learning provider] workplace learning programme so that they can decide whether they would like to be personally involved in the project. They can refuse their involvement without providing a reason for this and without any prejudice; it will not affect their performance on the programme and the researcher will not be supporting or assessing them. The choice to be involved is entirely theirs.

What will participating in the research project involve?

Learners who are currently undertaking or have previously undertaken a workplace programme, will be invited to attend an interview. This will focus on their experiences of workplace learning, what makes it effective and how the success of these programmes is perceived within your organisation.

Two Managers within each participating organisation will be invited to an interview; the purpose of this is to explore the organisations' approach to learning, their experience of providing workplace learning programmes, their views on the success of such programmes and the outcomes that have been identified for the workplace learning programme in order to ascertain its effectiveness within the organisation. Research methods that will be used include the following:

- Initial fact finding visit
- Analysis of documents such as Learning and Development policies, Mission Statements, appraisal documentation pro formas etc to ascertain the philosophy that sits behind perceptions of learning within the organisation
- Interviews with managers lasting approximately an hour (one learning and development manager and one operational manager from each organisation) exploring the organisations' approach to learning, their experience of workplace learning programmes, views on the success of such programmes and outcomes they have identified for these programmes
- Interviews with learners, who have some experience of the workplace learning programme (approximately 12 interviews in total, each lasting approximately one hour)
- Short follow up interviews with learners or managers may also be requested to clarify issues

The research project is committed to following The British Psychology Society and BERA guidelines with respect to consent, deception, debriefing, withdrawal, confidentiality and protection of participants.

How will the information collected be used and stored?

Following research protocols, any information provided will be anonymised and participants will not be named. Individual contributions will not be shared with the employer, or other staff in [name of learning provider]. Data collected will be analysed and presented collectively as the views of a group of students within each organisation and therefore will not be personally attributed. This data will be written up into a final report which will be submitted in October 2012. The report will be lodged in the British Library and be accessible to the general public as well as your organisation. Additionally, extracts from the report may be presented to a variety of audiences. Potentially, your organisation may be identifiable to those that know it very well; however, your organisation will not be named in the report. Transcripts, recording and any data collected will be kept safely locked away and electronic files will be password protected. Once the final report has been submitted and scrutinised by The Open University, any data collected (e.g. transcripts / notes of interviews, recordings etc) will be destroyed.

What if my organisation chooses to be involved but later wants to withdraw or is unhappy with aspects of the research and wants to talk about this to someone other than the researcher?

If you choose for your organisation to be involved but later decide to withdraw, you may do this without having to state a reason to the researcher. If you are unhappy about the research and wish to discuss this with someone other than the researcher you can contact the researchers' supervisor as follows: Dr Fiona Reeve, Faculty of Education and Language Studies, Floor 2, Stuart Hall Building, Open University, Walton Hall, Milton Keynes, MK7 6AA. Tel: 01908 659066 email: F.J.Reeve@open.ac.uk or Representative from XXX University

When will the research project be completed?

The final thesis will be submitted in September/October 2012

To request further information and to express an interest in being part of the research project contact:

Christina Palmer
[Name of learning provider]
Address

t XXX XXXX XXXX m 07872 189 955 e XXXXXXXX

Appendix 4 - Information Sheet for Potential Participants

Research Project Title: Workplace Learning and Organisational Culture: Improving the workforce from within

What is the research about?

The research project will explore the context and effectiveness of workplace learning. It will focus on how specific organisational perceptions and practices influence the implementation, integration and impact of workplace learning programmes.

Who is undertaken the research?

Christina Palmer will be undertaking the research as part of an Open University Doctorate in Education programme. Christina works as a consultant for [name of learning provider] which is a wholly owned subsidiary of XXX University.

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What are the research questions?

1. In what ways is workplace learning perceived as effective or not effective by employers and employees?
2. What are the features of organisations which impact on this perception of effectiveness and non-effectiveness?
3. What organisational practices might influence the effectiveness of workplace learning?

What is the research strategy?

The research is into stages:

Stage 1 – Learning and Development / Operational Managers within 5 organisations were interviewed, to provide some insight into definitions and potential features of effective workplace learning. These interviews took place in summer 2010

Stage 2 - In stage 2 the number of organisations involved will be reduced to 2 and participants will include managers and learners undertaking workplace learning programmes. The focus of stage 2 will be to explore how effectiveness of workplace learning is defined within these particular organisations, what features of organisations impact on these perceptions and what organisational practices might influence the effectiveness of workplace learning?

What research methods will be used?

The research will use semi-structured interviews. The main study will use the following methods:

- Initial fact finding visit
- Analysis of documents such as Learning and Development Policies, Mission Statements, appraisal documentation etc to ascertain the philosophy that sits behind perceptions of learning within the organisation
- Interviews with managers (a learning and development and operational manager from each organisation) exploring the organisations' approach to learning, their experience of providing workplace learning programmes, views on the success of such programmes and outcomes they have identified for these programmes
- Interviews with learners who have or will be undertaking a workplace learning programme, each lasting approximately an hour
- Longitudinal data, derived from follow up interviews with learners and managers may also be included

The research project is committed to following The British Psychology Society and BERA guidelines with respect to consent, deception, debriefing, withdrawal, confidentiality and protection of participants.

Why is the research being done?

Workplace learning programmes are increasingly being offered by Higher Education providers and therefore the results of the research project will be useful in providing an indication of factors within organisations which make the implementation of workplace learning successful. This could enable organisations to review their support processes.

Why have I been invited to be involved in the research?

You have been invited to be involved in the research as you or the organisation you work within has undertaken or are currently undertaking a [name of learning provider] workplace learning programme. Your employing organisation has expressed commitment to being involved in the project and has circulated this information to you in order so that you can decide whether you would like to be personally involved in the project. You can refuse your involvement without providing a reason for this and without any prejudice. The choice to be involved is entirely yours. The researcher, Christina Palmer, will not be involved in marking or teaching on your programme.

What will participating in the research project involve?

If you are a learner who currently is undertaking or has previously undertaken a workplace programme, you will be invited to attend an interview which will take up to one hour. This will focus on your experiences of workplace learning, what makes it effective and how success of these programmes is perceived within your organisation.

If you are a manager within a participating organisation you will be invited to an interview which will take up to one hour, the purpose of this is to explore the organisations' approach to learning, your experience of providing workplace learning programmes, your views on the success of such programmes and the outcomes that have been identified for the workplace learning programme in order to ascertain its effectiveness within the organisation.

How will the information I provide be used within the research project and be stored?

Any information provided by you will be anonymised and you will not be named. Your individual contributions will not be shared with your employer. Data collected will be analysed and presented collectively as the views of a group of students or managers within each organisation and therefore will not be personally attributed to you. This data will be written up into a final report which will be submitted in September/October 2012. The report will be lodged in the British Library and be accessible to the general public as well as your organisation. Additionally, the report may be presented to a variety of audiences. Potentially, your employing organisation may be identifiable through it being identified by its description; however, neither you nor your organisation will be named in the report. Transcripts, recording and any data collected will be kept safely locked away and electronic files will be password protected. Once the final report has been submitted and scrutinised by The Open University, any data collected (e.g. transcripts / notes of interviews, recordings etc) will be destroyed.

What if I choose to be involved but later want to withdraw or am unhappy with aspects of the research and want to talk about this to someone other than the researcher?

If you choose to be involved but later decide to withdraw, you may do this without having to state a reason to the researcher. If you are unhappy about the research and wish to discuss this with someone other than the researcher you can contact the researchers' supervisor as follows: Dr Fiona Reeve, Faculty of Education and Language Studies, Floor 2, Stuart Hall Building, Open University, Walton Hall, Milton Keynes, MK7 6AA. Tel: 01908 659066 email: F.J.Reeve@open.ac.uk or Representative from XXX University

When will the research project be completed?

The final thesis will be submitted in September/October 2012

To request further information and to express an interest in being part of the research project contact:

Christina Palmer
[Name of learning provider]
Address
t xxx xxxx xxxx m 07872 189 955 e XXXXXX

Appendix 5 - Consent Form

I agree to be involved in the Doctorate in Education research project conducted by Christina Palmer which focuses on perceptions of effectiveness of workplace learning.

I am aware that my responses during the interview will be recorded. Data collected during the research project will be anonymised as far as possible, however because some issues may need to be described, complete anonymity cannot be guaranteed. Although the results of the research project will be in the public domain, no organisations or individuals will be referred to by name.

I have had, for the purposes of the research project, the following points explained to me and been given the opportunity to ask questions;

- I have been informed that I may refuse to participate at any point by simply saying so
- I have been assured that my confidentiality will be protected as specified in the letter/leaflet
- I agree that the information that I provide can be used for educational or research purposes, including publication

☐
☐
☐

I understand that I may withdraw from the research project at any time prior to the research report being submitted September/October 2012 by contacting the researcher, Christina Palmer as follows:

Christina Palmer,
[Name of learning provider]
Address
t XXX XXXX XXXX

m 07872 189 955

e XXXX

SIGNATURE	
NAME	
ORGANISATION	
DATE	
A copy of this form will be forwarded to you after the interview	

Appendix 6 - Reflective Journal for EdD

Date	Activity	Reflection	So what	What does this mean for the research
July 2011	Interview with participant from case study 1 undertaken at the participants workplace	<p>This participant was very open during the interview and appeared to have reflected a lot on learning in the workplace. I had a 'ping' moment when the participant told me about an incident where a worker was faced with an emergency situation and had to make a choice about what action to take. In summary, the worker, who had related experience in another organisation but was relatively new in this particular role, was faced with a situation where if they followed procedure, serious injury might occur. However, breaking with procedure might save life. The worker chose to break with procedure which resulted in a positive outcome. However, as the person's manager, the participant/interviewee could either discipline the worker or commend them and use it as a learning experience for others, the participant chose the latter. The participant raised 2 issues in relation to this; 1. How as an organisation, managers want their workers to be competent, being able to following procedures and be able to undertake skilled processes but also be capable to react and respond to unusual situations and 2. Managers have freedom to respond to situations in quite extreme ways e.g. other managers may have chosen to reprimand the worker rather than see it as a learning experience.</p>	<p>I pondered if the manager would have thought differently or taken a different course of action if the outcome of the workers actions had been less positive?</p> <p>The issue of Competence and Capability is raised here as if the worker had used a more competency based approach, they would have followed protocol. One could summarise that their previous experience had giving them a capability (and confidence?) to take actions outside of protocol</p> <p>Different managers may have had different responses, where do these differences come from? What are they based on</p>	<p>The manager and the way in which they respond to a whole range of incidents appears to be pivotal to how less formal workplace learning takes place. How does an organisation decide what a 'good' managerial approach is to workplace learning and how do they foster it within managers responsible for supporting workers?</p> <p>Is capability something which only comes with experience? Can capabilities be learnt or engendered for less experienced people? What do employers want?</p>

Reflective Journal for EdD

Date	Activity	Reflection	So what	What does this mean for the research
01/10/11	Data analysis, complexity of workplace learning and perceptions of effectiveness	<p>I've always held the view that a positive learning experience was about far more than the quality of teaching, environment etc.</p> <p>I have always felt that learners need to either be or supported to get to a state of mind where they are receptive to learning. Also, the relationship with the facilitator of the learning is a key factor on the quality of a learning experience.</p> <p>In terms of workplace learning additional factors seem to come into play such as the relationship with their line manager, their work role, personal circumstances etc</p> <p>Participants comments on a range of factors impacting on effectiveness but very little on the quality of teaching, only to compliment it and talk about it rather generalist terms</p>	<p>One therefore might argue that potentially a positive workplace learning experience is more complicated to achieve than in a more traditional learning environment such as a college or CPD type courses due to the number of factors which seem to be in place for workplace to...work.</p> <p>Do these factors differ between workplace, work roles and individuals?</p>	Line managers who support workers on a workplace learning programme need to be able to understand a whole range of factors including the worker's individual learning history, learning style, personal circumstances, and time management skills. Perhaps expectations and levels of autonomy need to be clarified from the start of the programme.

Reflective Journal for EdD				
Date	Activity	Reflection	So what	What does this mean for the research
01/10/11	Data analysis, complexity of workplace learning and perceptions of effectiveness Continued	Continued	How does the manager understand the learner and establish what they need?	Link to Boud's definition and the need for baseline assessment', however, this research indicate that these assessments need to be much more comprehensive and cover a much wider range of areas, not just ability

Appendix 7 – Example Transcript

Example Abridged Transcript

This is an example of how the analysis of data was undertaken. The transcript has been edited to contain excerpts of the full transcript to show an example of the initial analysis (first stage read through) which took place. This was one of the transcripts that I analysed towards the end of the analysis on case study 1.

Questions

Did you choose to undertake the workplace learning programme?

No I didn't.

You were nominated then?

Yes it was decided, because originally the programme was aimed at [work role], so this morning you have already spoken to XXX and to XXX– the cusp of going into [senior positions] and doing that sort of stuff of which I was one of them. If I was given a choice I wouldn't have done it to be absolutely honest, I'm at the back end of my career although personal development and all of the rest of it In fact upstairs we've just been talking about team motivation and discussing Maslow and all that sort of stuff and self actualization for me isn't learning this stuff, self development isn't that. I'm just not that interested in it, some people love it and that's fine I'm not saying it's wrong, just that what motivates me is slightly different.

...I'm sure it is because my wife is the same, she just needs to know stuff, she's a learner, she loves to learn stuff where I'm slightly different, I'm motivated in a different way. I mean I like learning stuff but I'm more inclined to learn, I want to learn why are my sinks gurgling in my utility and I want to find out why that's doing that you know, I think it's because there's not enough air getting in so I've got to work out how I'm going to sort that out, that's my thing where as that would leave [wife's name] completely cold, if she needed to learn about something, she would read and read and read, she wants to know where I'm not that inclined. So practically I enjoy stuff, but the theories, the models and the Betts, although when I do them, so when we have a discussion upstairs, I have an opinion and I get stuck into it but I'm probably less inclined to have looked at various models, and gone oh yes this one's doing this and this one's doing that, but when I've talked about it I'm probably talking about the same stuff but I haven't got the academic underpinning knowledge to actually label it and say oh yes well that's that and that's that.

Yes I understand, so when you have learnt about a particular leadership tool, it confirms why you do things in a particular way why I do it that way?

.... It's wrong of people to think that we should carry on and work just as hard, because nobody says you're going to be made redundant but the threat is there, and it affects people and you have to understand that, so we can't understand that because people don't want to understand it, people just go no, no, no we're not going to make people redundant yet so why

Comment [c1]: Nominated not volunteered

Comment [c2]: Programme being used to prepare workers for new roles?

Comment [c3]: Potential conflict between individual and organisational motivation. Theme?

Comment [c4]: Possible not engaged with the programme content, doing programme as part of role than for personal aspirations?

Comment [c5]: Alluded to different learning styles and motivations for learning

Comment [c6]: Underlying concerns?

worry about it. That classic of why worry about what you can't affect, well some people are very good at that some people are not and we have to understand that. Whether it's useful to be able to stick a label on that I don't know or whether all you need to be able to do to be a good manager or a good team leader is to understand people's suffering and why they are suffering...

Comment [c7]: Appears to be challenging the value of theory here rather than understanding people in a more general way

What types of learning do you associate with workplace learning?

I suppose it depends on who you are, where you are in the organization, our organization. So if you take xxx whose job is probably 95% practical so that it's easier to put a model on them or to identify what workplace learning for them is because you say well it is the acquisition of skill, I want you to do this so I'm going to show you how to do this and once we've shown you, you're going to show it back and then you're going to go away and have a practice and then eventually you're going to demonstrate to me that you can do it competently and then every now and again I'm going to ask you to show me you can continue to do it competently, so that whole basis of giving them the skills, then demonstrating it and maintaining their competence in that.

Comment [c8]: Acquisition model?

Comment [c9]: Competence? Theme?

I think the higher into the organization you get or more into the type of work that we're doing and that workplace learning around 'what's the difference between inputs and outputs' and 'outcomes and strategies' and that sort of stuff, which is a little less easy to pin down really because you're into people's opinions... So when we talk about shall we stretch our targets, shall we try and do more or reduce more and my discussion around that if there is a definite correlation, because if there definitely is then let's do more of them – but I don't think there is a correlation between that and that. I think we have got to try and measure this, but how we physically do that is anybody's guess because nobody really managed to work that one out yet – and for me that if you are teaching me how to put a ladder up, I can work with that because there it is, you can see what it is, you can see the task, get on with it, they show you, you do it, demonstrate it but when you start talking about more complex issues that have got many answers then that's when I find you don't have such a strong basis. We're very strong in the area of practical teaching stuff, very, very strong there although we will have the debate about how you will maintain that competence because we used to do a lot of, when I joined, drilling although they don't call it drilling anymore it's a dirty word! But it's as you go out and practice stuff and you just keep practicing it. This process of, and again it's like driving a car, when you first start driving a car you're a bit ropery, a bit grumpy but eventually it gets into that sub-conscious where you are doing it and you can do two or three things at once, so you can have the radio on and you can think about other stuff, but when something happens your react quite quickly because sub-consciously you're there and it's the same with [four workers] you want them to be so good at what they do, not from a skill point of view because it's so natural, that if something goes wrong they quickly put it right because it's I can see what's going on hereand that's why we used to do it by rote.

Comment [c10]: Is this about reflection or measuring

Comment [c11]: Competence and capability? Theme?

What do you think the features of effective workplace learning are?

I suppose I'm going to have to say time to do it. Commitment from everybody so a good understanding of what's going on.

Comment [c12]: Time? Theme?

Comment [c13]: Commitment from everyone

I think the organisation needs to know where we are and what we're doing, because

otherwise people just see you as having a bit of a jolly, what they doing up there? When you come out and start talking to your teams about this sort of stuff, do they have an understanding of where you are coming from, what you are trying to achieve – that's a difficult one because it's about their learning. So you go and talk to [workers] about Maslow or any of the others that we've been doing today but I've forgotten and try and point out this is what's going on, they just look at you, I'm not interested in that rubbish. I mean they are very similar to where I am, they are doing it but they don't understand why they are doing it and you try and bring them to a place where they understand that.

Comment [c14]: Suggesting difficulties in sharing learning with the team Theme?

Comment [c15]: Negativity?

I think that time and commitment certainly from your seniors, so they've done a genuine training needs analysis on you, GAP analysis, so where are you – because some people in that room don't need this, because they are already there, but the trouble is because they are already well read in this area they can dominate and monopolise the session, (oh because I know this, oh I've read this or I've read that) whereas other people, like me who are a bit further back down the track, still trying to get their head around some of these models and what they actually mean. I mean the discussion's great because we can eke that out, make sure you've got people in the room who actually need it and the one's who just like being there. because what we've just done is say right all of the [senior officers] will go on it, you'll all do it because you all need it. Well who says because if you actually analyse them, there's probably two or three people in there who don't need this; they need other things but they don't need this. They're okay, they are capable but we have got this inherent fear that if they're not in the room together, then we're all missing out – well why are they having it and I'm not.. Because it's all about you're still progressing, if I don't do this, does that mean I won't get progression next time.

Comment [c16]: Learning through the life course? Other reasons for this? Theme?

So are there any other features that you think make a good workplace learning programme, you talked about the organisation is there anything else?

Comment [c17]: Is programme trying to do too much? Differing levels of expertise from participants

Comment [c18]: Relates to literature regarding how training can be perceived as a reward or a mark in the workers favour e.g. if you are excluded is something wrong?

Comment [c19]: Motivation, personal agency Theme?

Well the person who goes on it has got to want to be there, they've got to be motivated – you know turning up for the sessions, doing the work in between so you're not, and I know we're acutely aware that (the facilitator) probably goes home and sobs when she thinks of us, because she comes in and says right the case studies and we're all just looking, and going oh yes and she knows we're just reading it as we're doing it., we're doing it on the fly because we just don't devote any time or effort to it and that's wrong of us and we've talked about that, and we've all said it's bad but we're all so max'd out at the moment it's just brain capacity.

Comment [c20]: Timing of the programme? Is the workplace learning programme aligned closely enough to the work and priorities of the organisation? Lifecourse theme?

What expectations does the organisation have of workplace learning?

I don't think it's got any to be honest with you I don't think it's got any.

Comment [c21]: No expectation? Or expectations which haven't been communicated to participants?

Does your manager have any expectations about what you personally will get out of the programme?

He's put it on my PDR and said you'll do it but I know because of the pressures at work that he won't explore it greatly with me. He won't say what have you got out of this? How do you feel that is? He's not requesting any time with me to say are you still going? What's happening? It's just because they're just too busy. He hasn't got any capacity to be able to sit down, because now he's got all three of us doing it, so he would have to do it with all three of us I don't think he's got the time. He will sort of touch in, he'll come to the presentation next week, came to the presentation last time, we did the presentation last time and some

Comment [c22]: Is this supportive management? Seems to be a choice of work or learning with no compromise Theme?

challenging stuff came out and the deputy chief was there and nothing has happened since, despite people saying we need to follow up on this because you walk out of that room and this will happen today, everyone will walk out of that room, straight into the next meeting and a load more priorities come flying in. You know there are guys not at that meeting because they've got so much other stuff to do, so this level of importance and there are only so much time in the day, so you can say well what is important to us; if this learning is important it would take [senior officer] or someone similar to say "this is happening".

... because of the way things are, costs etc and the way people learn has all changed; they are exploring different ways of doing distance learning and all the rest of it, but I must say there's nothing like actually being put there and you're sitting there because you've got everything else because your away from [the organisation]; someone else is doing your work, so you've gone there, and when I [did a course] course in 2000, it was a 5-week course and it was hard work but we were there, everyone was in the same boat, every day you were focused on it – that was the goal you'd just got to get on with it, you'd got exams to pass at the end of it you came out with a certificate job done. If you tried to do that through learning in the organization it's almost impossible to do and our maintenance of competence is becoming very difficult because we still have to maintain a level of competence...and do similar stuff there, so you have to block out time to go and do that and it's really hard, because you block the time out and some other stuff comes in and you think I've got to do this now and I've got to do that and that falls off the edge, because nobody's really monitoring it.

So are they monitoring the effectiveness of this programme at all as it goes along do you know?

No I don't think so.

And are there any plans to measure it at the end the effect that it has had, that you are aware of?

Not that I am aware of. I know [the facilitator] doing a reflective time and we did have a date in where there was another group of people coming in I don't know if that's going to happen now because that got put in our diaries and taken out again, whether that didn't suit somebody.

I mean there will be some changes I'm sure and that's by almost by fluke and not by design because one of the people within the cohort, since the programme started has been promoted two levels he's now gone from being an [senior officer], went to be an [more senior officer] and is now one of our principal officers. So if anything is going to change through this, he's going to be the person who will take it but the trouble is you could argue that because of the type of person he is, he would have done that anyway. The course hasn't influenced him because he was one of the influences to get the course going.

Comment [c23]: Time and the perceived lack of it seem to be a major issue regarding effectiveness of the programme Theme?

Comment [c24]: Workplace learning seen as a cheaper option?

Comment [c25]: Learning away from the workplace can be a better experience than workplace learning?

Comment [c26]: Time again and having to prioritise Theme?

Comment [c27]: No monitoring of effectiveness or a plan is place but not communicated?

Comment [c28]: Programme is possibly being measured but no clear detail have been communicated

Comment [c29]: Reflects the depth of feeling / perception from participant that there will be little effect (perhaps as he indicates above this is because he feels there hasn't been time to follow up ideas) Theme?

Comment [c30]: Is promotion a measurement? How does this make others feel about what is classed as success on the programme?

Comment [c31]: What successes can be attributed to the programme? How can other factors impact on this?